DOCUMENT RESUME

ED 212 899 CE 031 526 ¼

AUTHOR	Jalowsky, Toby D.; And Others
TITLE	Arizona Business Occupations, Competency-Based Curriculum Guide.
INSTITUTION	Arizona State Dept. of Education, Phoenix.
PUB DATE	Aug 81
NOTE	723p.; For a related document see ED 193 500.
EDRS PRICE	MF04/PC29 Plus Postage.
DESCRIPTORS	Accounting; *Articulation (Education); Behavioral Objectives; Business Administration; *Business Education; *Business Skills; Clerical Occupations; Competence; *Competency Based Education; Curriculum Guides; Data Processing Occupations; Education Work Relationship; High Schools; Learning Activities; Learning Modules; *Minimum Competencies; Occupational Clusters; *Office Occupations Education; Postsecondary Education; Recordkeeping; Secretaries; Teaching Methods; Test Items; Vocational Education

ABSTRACT

This competency-based curriculum guide to business occupations was designed to improve the articulation in business education programs among high schools, between high schools and postsecondary institutions, and between schools and the business community in Arizona. The teaching units are to be used to develop skills in areas identified by employers as necessary for entry-level positions. The curriculum guide contains 21 modules of instruction, grouped under the three general career clusters of accounting/data processing, administrative support/clerical-secretarial, and pre-professional/managerial. Subjects covered in the modules are accounting; applying for a job; business law; business math/machines; business organization/management; cooperative office education; communication arts; data/information processing; energy conservation; national student office organizations competitions; human relations; machine dictation/transcription; mail processing; record keeping; records management; reference sources; reprographics/duplicating; shorthand; telephone techniques; typing; and word/information processing. Each unit contains an overview of the levels of competency to be achieved, competency goals and performance objectives, course outline, learning activities, teaching suggestions, test items, student competency profile, and certificate of competency (suitable for reproduction). (KC)

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ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE

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Printed by the
Arizona Department of Education
Phoenix, Arizona

Total Copies Printed - 400
Total Printing Cost - $2,600.00
Unit Printing Cost - $6.50
Date of Printing - 8/81

AUTHORS OF THE ARIZONA BUSINESS OCCUPATIONS COMPETENCY-BASED CURRICULUM GUIDE REVISION-1981

Director

Dorothy L. Fitz, Yavapai College, Prescott, Arizona

Assistant Director

Ann Allison, Independence High School, Glendale, Arizona

William Cavett
Trevor Browne High School
Phoenix, Arizona

Farrel Cutler
Agua Fria High School
Avondale, Arizona

Loudene Ellis
Washington High School
Phoenix, Arizona

Patricia England
Globe High School
Globe, Arizona

Orca Galloway
Cortez High School
Phoenix, Arizona

Bruce Heatwole
Glendale High School
Glendale, Arizona

Cheryl Kelly
East High School
Phoenix, Arizona

Nancy Sharpe
Tolleson High School
Tolleson, Arizona

Stella Sorensen
Yuma High School
Yuma, Arizona

L. L. Via
Scottsdale Community College
Scottsdale, Arizona

Marilyn Witcher
Lake Havasu High School
Lake Havasu City, Arizona

Ex-Officio Member

Toby D. Jalowsky, State Supervisor, Business Education
(Principal Author)

In Cooperation With

Yavapai College
Prescott, Arizona

FORWARD

The responsibility of business education is to offer programs that permit youth and adults to develop competencies required to enter the work force and to insure quality workers for business. The future of business education depends on efforts to update and improve instruction for business programs. Business teachers must be willing to be innovative. The business office has undergone tremendous change in the past decade with a change in technology leading the way. The business curricula must be evaluated regularly and revised to reflect the technological changes, social changes, and needs of the business world.

This guide will assist in coordinating and articulating between various educational levels and business. Curriculum change is inherent in preparing for employment in business. Alternative methods for learning are necessary to meet the needs of students with varying interests.

The competencies to be achieved that are included in this guide have been carefully identified and verified. This guide will assist in making students aware of the competencies they need to achieve for specific career clusters and the criteria used in assessing achievement.

The Arizona Department of Education wishes to thank the authors who are comprised of a cross section of business teachers from secondary and postsecondary schools from throughout Arizona. It is hoped that this guide will be useful in implementing a competency-based educational program.

Toby D. Jalowsky
State Supervisor
Business Education

PREFACE

This guide was designed for competency-based instruction to better meet the needs of business education and to fulfill legislative mandates. A major function of this guide is to provide a vehicle for articulation among high schools, between high schools and postsecondary institutions, and between schools and the business community.

Competency-based instruction includes the use of teaching units or modules designed to develop skills in areas identified by employers as necessary for entry-level positions. These skills are measurable, and minimum standards have been developed in cooperation with business advisory council members, employers, and classroom teachers.

National surveys and research including NOBELS (New Office and Business Education Learning Systems), ERIC, and statewide surveys of businesses in which Cooperative Office Education students are employed were resources used by the Curriculum Committee in writing this material.

A variety of reference sources were used to develop the materials in this guide; therefore, it is difficult to give proper credit to all of the original sources.

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ACCOUNTING/DATA PROCESSING CAREER CLUSTER

Accounting and data processing are among the fastest growing occupations one of the fastest-growing fields in the country. Many changes have taken place in the methods used by businesses to process financial data. Electronic data processing has decreased the amount of routine manual recording such as journalizing and posting, but it has not decreased the need for understanding basic accounting principles.

With the changing technology, everyone may need to have computer literacy, and all business students need some introduction to computers. Many schools now have access to a computer through time-sharing. With the low cost of microcomputers, it should soon be possible for any classroom to have some type of computer equipment. The microcomputer can also be used as word processing equipment allowing for teaching the total information processing concept.

The business student needs a background in accounting and data processing for a wide range of accounting, computing, clerical, and data processing jobs. The foundation skills for further education in computer science, management information systems, and certified public accounting can be provided without the use of extensive computer equipment.

Students who have demonstrated competency in the accounting/data processing cluster may be prepared for careers within this cluster in such jobs as:

ENTRY LEVEL JOBS

- Bookkeeper
- Cashier
- Clerk
  - Accounts Receivable
  - Payroll
  - Accounts Payable
  - General Ledger
  - Data Entry Operator
  - Programmer Trainee

LEADING TO

- Accountant
- Certified Public Accountant
- Data Entry Supervisor
- Data Processing Manager
- Programmer
- Systems Analyst
- Systems Programmer

ADMINISTRATIVE SUPPORT/(Clerical-Secretarial)

Students in the administrative support cluster should be prepared with marketable skills to meet the demands of the automated office now and in the future. The demand for office personnel is continuing to increase at a phenominal rate.

The instruction for entry-level employment should consist of an integration of selected office education activities designed to give the student technical skills, human relations skills, business knowledge, and professional attitudes.

A wide range of skills will be required of the office worker. These skills might include: typing, filing, record keeping, reprographics, telephone techniques, automated office equipment, mail handling, basic mathematics, word processing, and data processing skills. Good communication skills are vital for every office worker.

Career Clusters (Continued)

As today's office becomes more and more complex, specialized skills are becoming commonplace for the office worker. More job opportunities will be available in this area than any occupational field in the next few years.

ENTRY LEVEL JOBS	LEADING TO
Cashier	Administrative Assistant
Clerk Typist	Office Supervisor
Correspondence Clerk	Executive Assistant
File Clerk	Office Management
Mail Clerk	Proofreader/Editor
Receptionist	Records Supervisor
Machine Transcriptionist	Word Processing Supervisor
Word Processing Operator	

PRE-PROFESSIONAL/MANAGERIAL

A good foundation in the organization of business, basic management functions, and personal business skills is important to any person entering a career in business.

The careers in the Pre-Professional/Managerial clusters will usually require advanced education. Some opportunities do exist however, for students without an advanced degree to enter management positions in smaller businesses.

ENTRY LEVEL JOBS	LEADING TO (usually requiring advanced degree)
Department Supervisors	Administration/Management
Assistant Managers	
Management Trainee	

LEVELS OF COMPETENCY FOR CAREER CLUSTERS

The following chart indicates suggested levels of competecy for each career cluster in this guide:

LEVEL	I	Introduction or Basic Skill
LEVEL	II	Reinforcement or Expansion
LEVEL	III	Refinement or Application
LEVEL	IV	Specialization or High Proficiency

	ACCOUNTING DATA PROCESSING	ADMINISTRATIVE SUPPORT (Clerical-Secretarial)	PRE-PROFESSIONAL MANAGERIAL
ACCOUNTING	IV	I	III
APPLYING FOR A JOB	III	III	III
BUSINESS LAW			I
BUSINESS MATH/MACHINES	IV	IV	IV
BUSINESS ORGANIZATION/MANAGEMENT			II
COE	II	II	II
COMMUNICATION ARTS			
LANGUAGE SKILLS	I	I	I
LISTENING	II	II	II
READING	II	II	II
SPEAKING	II	II	II
WRITING	III	III	III
DATA/INFORMATION PROCESSING	II	I	I
HUMAN RELATIONS	I	I	I
MACHINE DICTATION/TRANSCRIPTION		IV	II
MAIL PROCESSING		II	
RECORD KEEPING		III	IV
RECORDS MANAGEMENT	II	IV	IV
REFERENCE SOURCES	I	IV	I
REPROGRAPHICS/DUPLICATING		III	
SHORTHAND		*IV	
TELEPHONE TECHNIQUES	I	I	I
TYPING	I	IV	I
WORD/INFORMATION PROCESSING	IV	IV	IV

*Optional

BUSINESS LAW - LEVEL I

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
BL-I-1	Given an objective test with 20 questions regarding the legal system	the student will complete the test	with 80 percent accuracy.
BL-I-2	Given 13 questions, regarding contracts	the student will list the word/words to answer each question	with 80 percent accuracy.
BL-I-3	Given an objective test with 20 questions regarding personal property	the student will complete the test	with 80 percent accuracy.
BL-I-4	Given an objective test with 20 questions regarding real property	the student will complete the test	with 80 percent accuracy.
BL-I-5	Given 20 definitions and 25 terms regarding commercial paper	the student will select the most appropriate word or phrase that best matches each definition	with 80 percent accuracy.
BL-I-6	Given an objective test with 20 questions regarding employment and agency	the student will complete the test	with 80 percent accuracy.
BL-I-7	Given 20 questions regarding insurance	the student will list the word/words to answer each question	with 80 percent accuracy.
BL-I-8	Given an objective test with 20 questions regarding business organization	the student will complete the test	with 80 percent accuracy.

BUSINESS LAW

DESCRIPTION

Business Law provides students with an understanding of how the legal system originated and how laws were developed and changed. The fundamentals of how the law relates generally to society and particularly to the citizen, the minor, the consumer, and the business community are important. As our society becomes more complex, it is important for individuals to have basic knowledge of how to avoid legal problems and when and what to do if legal difficulties arise. Also, business law may serve to interest students in law as a profession.

This unit may be useful in preparing students for competing in FBLA/PBL, the Arizona State sanctioned co-curricular student organization. Competitive events: Business Law, Mr. and Ms. Future Business Executive.

OVERVIEW OF LEVELS

LEVEL I	LEVEL II	LEVEL III	LEVEL IV
Legal System			
Contracts			
Personal Property			
Real Property			
Commercial Paper			
Employment and Agency			
Insurance			
Business Organizations			

BUSINESS LAW CRITERION-REFERENCED TEST - LEVEL I

BL-I-1 - LEGAL SYSTEM

Directions: In the answer column at the left, write the letter that best completes the statement.

_d_ 1. One of the purposes of law is
(a) to restrict the conduct of people and keep them from doing what they want to do.
(b) to keep policemen on the payroll.
(c) to protect people who cannot afford to hire a lawyer.
(d) to promote justice and the general welfare of all.

_d_ 2. A minor is one who
(a) has reached the age of majority.
(b) is over 21 years of age.
(c) has to live with parents.
(d) none of the above.

_b_ 3. The Constitution of the United States is
(a) governed by the 50 state governments.
(b) the supreme law of the land.
(c) constantly changed by the Supreme Court.
(d) voted on by the people every four years.

_c_ 4. Laws enacted by federal or state legislative bodies are called
(a) ordinances.
(b) constitutions.
(c) statutes.
(d) the Bill of Rights.

_b_ 5. Law that is concerned with wrongs against individuals is called
(a) criminal law.
(b) civil law.
(c) administrative law.
(d) business law.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
BL-I-7	Insurance Property Social FICA Unemployment Compensation Survivors Disability Health Life Ordinary Term Limited Payment Endowment Whole Life Health and accident Automobile Liability Comprehensive/Collision Uninsured No Fault	BL-I-7	Invite an insurance agent or insurance adjuster to speak to class on insurance issues. Analyze the content of sample policies. Assign two or three students to contact insurance agents or companies to obtain premium rates for four different types of policies (use same face value and age range). When this information is brought back to class, discuss why the premium rates are different for each type of policy and why rates vary from company to company. Poll students to determine the premiums being paid for automobile insurance and discuss why some are paying more than others. Obtain insurance rate tables from a local insurance agent or company and have students compare total premiums paid on different kinds of policies at given intervals. HINT: Students' current events notebooks may contain some interesting articles on insurance. REFER TO: BUSINESS LAW, p. B/L-3, and BUSINESS ORGANIZATION AND MANAGEMENT, p. O/M-3.
BL-I-8	Business Organizations Forms of Business Sole Proprietorship Partnership Corporation Cooperative	BL-I-8	REFER TO: BUSINESS ORGANIZATION/MANAGEMENT

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
BL-I-6	Employment and Agency Employee/Employer Agent/Principal Independent Contractor Unions/Collective Bargaining Protection of Minors Fringe Benefits Rights and Obligations Government Regulations	BL-I-6	Ask students who are currently employed or have been employed to relate their experiences relating to legal issues to the class. Assign each student to name at least one job situation (sales clerk, janitor) to be written on the chalkboard. From this list each student is to identify on paper which job results in the person being an employee, an agent, or both. Then discuss why they were classified as such. Divide class into small groups (4-6) and give each group a debatable topic dealing with employment such as unions, equal rights, and negotiations. Half of each group will prepare arguments from the standpoint of the employee and the other half from the standpoint of the employer. Each group should present their arguments to the class. Use current events to analyze union activity. Assign students to interview one or two union members and prepare brief report on information obtained. REFER T0: BUSINESS LAW, p B/L-3.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Commercial Paper (Continued)		
	Elements of Negotiability Written, Signed, Delivered Unconditional Promise Words of Negotiability Payable in Definite Money Amount Payable on Demand or at Definite Time		Give each student a handout with both the front and back of a check on it. Assign each student to complete the check for any given amount, and give to teacher for approval and signature. Each student will then endorse check and deliver it to another party. The second party will use a different type of endorsement and deliver it to a third party. The fourth party receiving the check will endorse it using the form that has not been used, and will then determine at which point the check became non-negotiable. Use bottom of handout sheet to record this information.
	Transfer Types of Endorsements Blank Special Qualified Restrictive		Assign half the class to write situations where they received checks as holders in due course and the other half write situations where they are not holders in due course. Use these for class discussion.
	Rights of Holders Holders Holders in Due Course		
	Defenses of Holders Limited (Personal) Universal (Real)		

BUSINESS LAW - LEVEL I

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
BL-I-4	Real Property Acquisition and Disposition Purchasing/Selling (Deed) Wills and Inheritance Adverse Possession Dedication Eminent Domain Public Grant Accretion Use of Real Property Limitations and Restrictions Easements Zoning Ordinances Leasing and Renting	BL-I-4	Invite realtor or title company representative to discuss purchasing and selling real property. Use the news media as a resource for obtaining information to discuss current real estate issues in your community. Contact a local title company for samples of contracts and forms. Secure a copy of local zoning laws from city hall. Assign students to categorize laws which benefit them and laws which restrict them as individuals.
BL-I-5	Commercial Paper Kinds Promissory Notes Certificates of Deposit Checks and Drafts Certified Checks Cashier's Checks Traveler's Checks Money Orders Drafts	BL-I-5	Use visual aids such as copies of promissory notes, drafts, checks, certificates of deposit, cashier's checks, and traveler's check's. Assign students to list the different kinds of checks and drafts and the advantages and disadvantages of each.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Contracts (Continued) Impossibility of Performance Operation of Law By Agreement Breach and Remedies Recission Damages Specific Performance		
BL-I-3	Personal Property Acquisition and Disposition Purchasing/Selling Cash Credit Gift Accession Intellectual or Artistic Labor Finding and Losing Occupancy Inheritance Wills Bailments Mutual Benefit Gratuitous Constructive	BL-I-3	Use chain progression for learning vocabulary and definitions. Teacher gives definition and calls on a student for answer. Student who answers correctly reads another definition and calls on different student for answer. Questions may be used in addition to vocabulary. Invite a guest speaker from a local bank, savings and loan, or small loan company to discuss the use of credit. Use pictures, lists, and/or surroundings to have students identify all personal property. Show sample wills, and then assign students to draw up their own will for whatever property they currently own. Use case problems found in most textbooks, and discuss the legal aspects of ownership (finding, losing, bailment).

BUSINESS LAW - LEVEL I

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Legal System (Continued)		
	Rights Education Necessaries Restrictions Driving Alcohol/Tobacco Truancy Curfew		Assign students to prepare lists of things they can legally do and not do as minors. Discuss lists. Assign each student to look up a statute that affects minors and make a report (oral or written) to the class.
BL-I-2	Contracts Legal Elements Competent Parties Mutual Assent Consideration Legality of Subject Matter Form Oral Written Termination Performance Title Warranties Liabilities	BL-I-2	Analyze and discuss personal legal problems shared by teacher and students. Assign different sections of textbook material covering contracts to small groups (2-4) of students. Assign students to them prepare and to pesent orally on their particular section. HINT: Suggest to the students that they prepare handouts such as crossword puzzles and sample contracts. Assign students to present dramatic skits emphasizing offers and counteroffers; valid, void, and voidable contracts; options; oral and written contracts.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
BL-I-1	Legal System Origin of Law Common (Unwritten) Written Function of Laws Protection Order Uniformity Court Systems Federal State Trial Court Family Court Juvenile Court Municipal Court Probate Court Criminal Court Law Enforcement Crimes Torts Minors and the Law Protection Abuse Contracts	BL-I-1	Use a combination of lecture and discussion techniques. Use available visual aids such as filmstrips and transparencies. Observe a trial by visiting a court. Conduct a mock trial. Videotape and use as a recruitment tool. HINT: Use actual cases from newspapers with student's filling in details as they might have been. Withhold actual verdict from class until trial is finished. Involve other students and faculty with trial. Obtain transcript of actual trial. Two trials could be prepared simultaneously with each team acting as jury for the other. Invite guest speakers such as Justice of the Peace, a police officer, sheriff, or a probation officer. Assign each student to prepare a current event's notebook dealing with law. Students should critique each article by writing a paragraph covering main points and stating their opinions. (Notebooks should be collected for a grade at the end of each grading period.) Set aside a period of time each week to discuss articles (above activity). Have several students volunteer to present one of their articles for discussion. All students should volunteer at least once during each grading period.

LEGAL SYSTEM (Continued)

d 6. In the First Amendment to the Constitution we are guaranteed certain rights of self-expression such as
(a) freedom of religion.
(b) freedom of speech.
(c) peaceable assembly.
(d) all of the above.

c 7. The right to fair and equal treatment under the law is called
(a) natural rights.
(b) political rights.
(c) due process.
(d) double jeopardy.

c 8. When decisions of a higher court appear in book form, they are known as the
(a) expatriation.
(b) citation.
(c) reporter.
(d) higher court.

a 9. When parents voluntarily surrender their rights to custody, control, and earnings of a minor child, it is called
(a) emancipation.
(b) guardian.
(c) majority.
(d) truancy.

c 10. Most contracts made by minors are
(a) valid.
(b) void.
(c) voidable.
(d) invalid.

b 11. A minor who owns and drives an automobile is generally treated as an
(a) infant.
(b) adult.
(c) irresponsible person.
(d) emancipated driver.

LEGAL SYSTEM (Continued)

d 12. A minor who commits a wrong against society and is tried in juvenile court may be found guilty of a
(a) crime.
(b) misdemeanor.
(c) tort.
(d) none of the above.

b 13. A private offense which has only individual consequences for which the injured party has a right to civil action is a
(a) theft.
(b) tort.
(c) crime.
(d) murder.

b 14. When defamation is written, it is
(a) intentional.
(b) libel.
(c) a crime.
(d) slander.

d 15. The act of being called to testify in court is referred to as being
(a) witnessed.
(b) appealed.
(c) summoned.
(d) subpoenaed.

b 16. An unlawful act which carries a prescribed penalty is a(n)
(a) immunity.
(b) crime.
(c) parole.
(d) tort.

c 17. Being released from custody after conviction and placed under supervision, is called
(a) pardon.
(b) parole.
(c) probation.
(d) plea bargaining.

LEGAL SYSTEM (Continued)

_b_ 18. An example of a tort is
(a) running a red light.
(b) slander.
(c) burglary.
(d) forgery.

_d_ 19. A defense to a criminal charge is
(a) an alibi.
(b) insanity.
(c) self-defense.
(d) all of the above.

_d_ 20. To sign another person's name to a document at his request is called
(a) forgery.
(b) misrepresentation.
(c) extortion.
(d) none of the above.

BUSINESS LAW CRITERION-REFERENCED TEST - LEVEL I

BL-I-2 CONTRACTS

Directions: Answer each of the following questions. There are 50 answers answers required on this test.

1. Name four elements of a contract.
   a. mutual assent
   b. legality
   c. consideration
   d. competent parties

2. Name three requirements of an acceptance.
   a. must be made by the person to whom the offer was made
   b. must be identical with the offer
   c. acceptance must be communicated

3. Name three requirements of a valid offer.
   a. must be intended to create a legal obligation
   b. must be definite
   c. must be communicated to the offeree

4. Name five ways an offer may be terminated.
   a. time stated
   b. at the end of a reasonable length of time
   c. rejected by offeree
   d. counteroffer is made
   e. revoked by the offeror before acceptance
   f. death or insanity of the offeror or offeree

CONTRACTS (Continued)

5. Define the following words dealing with contracts.
   a. express contract - one in which the agreement is stated in words, written or spoken
   b. implied contract - one in which the intent of the parties is shown by their conduct and actions
   c. formal contract - is a written contract that must be in some special form to be enforceable
   d. simple contract - all contracts that are not formal
   e. executed contract - one that has been fully performed or completed by both parties
   f. executory contract - one that has not been fully performed

6. Name five types of contracts that are subject to the statute of frauds.
   a. a sale of goods for $500 or more
   b. a contract that cannot be performed in one year
   c. a contract for the sale of real property
   d. a contract where marriage or the promise of marriage is a consideration
   e. a contract to pay the debt of another
   f. to be personally liable for the debt of a decedent's estate

7. Name six elements a memorandum must contain if it is to satisfy the statute of frauds.
   a. date
   b. place
   c. name of the parties

atter identified

5. Define the following words dealing with contracts.
   - a. express contract - one in which the agreement is stated in words, written or spoken
   - b. implied contract - one in which the intent of the parties is shown by their conduct and actions
   - c. formal contract - is a written contract that must be in some special form to be enforceable
   - d. simple contract - all contracts that are not formal
   - e. executed contract - one that has been fully performed or completed by both parties
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   - d. a contract where marriage or the promise of marriage is a consideration
   - e. a contract to pay the debt of another
   - f. to be personally liable for the debt of a decedent's estate

7. Name six elements a memorandum must contain if it is to satisfy the statute of frauds.
   - a. date
   - b. place
   - c. name of the parties
   - d. subject matter identified
   - e. signature of the party being sued
   - f. material terms of the agreement

8. List the five elements that must be present for fraud.
   - a. false representation or deliberate concealment of facts
   - b. concealed facts must be material
   - c. person making it must know it to be false
   - d. must be made with the intention of influencing others
   - e. must induce action and must cause injury

9. Name five types of agreements that are illegal.
   - a. agreements to commit crimes or torts
   - b. agreements that are unconscionable
   - c. agreements to pay usurious interest
   - d. agreements that unreasonably restrain trade
   - e. agreements that tend to obstruct justice

CONTRACTS (Continued)

10. Define the following three words.
    a. consideration - giving up something in return for a promise
    b. forbearance - refraining from doing what one has a right to do
    c. past consideration - value given before a contract is made

11. Name three ways a contract may be discharged.
    a. agreement
    b. impossibility of performance
    c. operation of law
    d. complete performance

12. The legal term for the following statement is:
No person can be tried twice for the same offense. Double Jeopardy

13. Fill in the blanks of the following sentence.
Because 15 years elapsed before any legal action was taken to collect a past-due debt, all rights to legal action were forfeited because of the statute of limitations .

BUSINESS LAW CRITERION-REFERENCED TEST - LEVEL I

BL-I-3 - PERSONAL PROPERTY

Directions: In the answer column at the left, write the letter that best completes the statement.

D 1. An example of personal property is (A) land, (B) typewriter, (C) dog, (D) both B and C.

B 2. Keeping a motorcycle for a friend who is on vacation is an example of (A) mutual benefit bailment, (B) gratuitous bailment, (C) constructive bailment, (D) none of these.

B 3. A pawnbroker shop in possession of a pawned watch is a (A) bailor, (B) business, (C) neither A nor B, (D) both A and B.

D 4. A person who finds a large amount of money in front of a bank should (A) know that it legally belongs to the finder, (B) know that it was abandoned, (C) turn it in to the bank, (D) try to find the owner.

B 5. As a condition of graduating from high school, one will receive $1,000. This would be classified as (A) gift,(B) contract, (C) inheritance, (D) negotiation.

C 6. Unordered merchandise received (A) must be returned to sender, (B) must be paid for, (C) belongs to receiver, (D) both B and C.

A 7. A typewriter purchased by Jane Smith from Joe Doe but later discovered to be stolen property belonging to John Jones (A) must be returned to John Jones, (B) may be kept by Jane Smith, (C) must be purchased from Jane Smith, (d) both A and C.

B 8. When a person dies intestate, relatives receive the deceased's property by (A) will, (B) inheritance, (C) gift, (D) both A and B.

D 9. An automobile left at a garage for repairs is an example of (A) mutual benefit bailment, (B) bailment for service, (C) neither A nor B, (D) both A and B.

A 10. If two or more people hold undivided shares or interest in property, known as tenancy in common, their interest (A) may be equal, (B) must be equal, (C) automatically goes to surviving owner, (D) both B and C.

PERSONAL PROPERTY (Continued)

A 11. When one takes a trip by an airline and checks one piece of luggage and carries the other on the plane, placing it under the seat, the airline is responsible for loss of (A) the checked luggage, (B) both the checked and carried-on luggage, (C) only the carried-on luggage, (D) neither piece of luggage unless insurance is purchased.

D 12. A credit card holder is liable for (A) all unauthorized purchases, (B) a maximum of $100 for unauthorized purchases, (C) no unauthorized purchases, (D) none of these.

A 13. The person who purchases on account is known as a (A) debtor, (B) creditor, (C) surety, (D) guaranty.

D 14. Property used as security for a loan is known as (A) inventory, (B) security interest, (C) assignment, (D) collateral.

C 15. Small loan companies are permitted by law to charge interest rates in excess of those permitted by usury laws because of (A) being privately owned, (B) being smaller than banks, (C) higher risks, (D) all of these.

D 16. Credit (A) allows a larger volume of buying and selling, (B) results in more impulse buying, (C) permits more people to take advantage of sales, (D) all of these.

D 17. Goods shipped f.o.b. result in transfer of title and risk of loss (A) at the time contract is made, (B) at the time merchandise is received, (C) at the time merchandise is delivered to the transportation company, (D) according to terms of the contract.

C 18. Keith wrote a song and protected his rights to it by means of a (A) patent, (B) trade secret, (C) copyright, (D) none of these.

C 19. A person who buys property acquires it by (A) credit, (B) cash, (C) contract, (D) accession.

A 20. When a married couple lives in a community property state (A) all property acquired after marriage belongs to both equally, (B) the husband has a greater interest in the property, (C) the wife has no legal interest in the property unless she is employed outside the home, (D) none of these.

BUSINESS LAW CRITERION-REFERENCED TEST - LEVEL I

BL-I-4 - REAL PROPERTY

Directions: In the answer column at left write the letter from Column 2 that represents the word or phrase that best completes each item in Column 1.

COLUMN 1

O 1. Real property consists of ______________________________.

H 2. The right to use another person's land for a specific purpose while the owner retains possession is referred to as a(n) ______________.

F 3. A written instrument that conveys title to real property is called a _________________________.

I 4. When the city votes to build an airport in an area already occupied and owned by others, it will use _______________ when necessary to acquire the needed property.

D 5. The first step in buying a piece of real property is the ___________.

A 6. A(n) __________________ is a condensed history of a particular section of land.

J 7. The deed, abstract, and other papers involved in a real estate transaction held by a third party are said to be in _____________.

T 8. A _____________ transfers the interest the grantor has in the property and nothing more.

X 9. The most common type of deed used by title companies is the ____________.

R 10. A written agreement that creates an interest in real property as security for the performance of an obligation is called a(n) __________________.

COLUMN 2

(A) abstract of title
(B) accretion
(C) adverse possession
(D) agreement
(E) codicil
(F) deed
(G) deed of trust
(H) easement
(I) eminent domain
(J) escrow
(K) executor
(L) exclusive possession
(M) holographic
(N) homesteading
(O) land and buildings
(P) landlord
(Q) lease
(R) mortgage
(S) public grant
(T) quitclaim deed
(U) survey
(V) tenancy at will
(W) tenancy for years
(X) warranty deed
(Y) will

BL-I-4 REAL PROPERTY (Continued)

Q 11. A contract to use real property for a period of time in exchange for rent is called a (n)________________

P 12. The owner who rents or leases real property is called a(n) ________________

W 13. When a lease specifies a definite length of time, it is called a(n) ________________.

V 14. When no specified term is expressed in a rental agreement, it is called a (n) ________________.

L 15. Three rights or duties of a tenant are (1) pay rent, (2) reasonable care, and (3) ________________.

C 16. One who openly and continuously uses land belonging to another without his permission for a long period of time (20 years or more) may acquire title to the land by________________.

Y 17. A written document disposing of possessions after death is called a(n) ________________.

M 18. A will that is written and signed entirely in the testator's handwriting is called a(n) ________________ will.

E 19. A formal written document to a will that changes the contents is called a (n)________________.

K 20. One who is appointed by the testator to be in charge of administering a will is called the ________________.

BUSINESS LAW CRITERION-REFERENCED TEST - LEVEL I

BL-I-5 - COMMERCIAL PAPER

Directions: In the answer column at left write the letter from Column 2 that represents the word or phrase that best completes each item in Column 1.

COLUMN 1

R 1. A written promise to pay a sum of money at a definite time.

C 2. A written promise by a bank to repay a deposit of money on a definite date with interest.

E 3. An order by a depositor to the bank to pay a third party.

D 4. A personal check guaranteed by the bank in advance of payment.

B 5. A check drawn by the bank on its own funds.

X 6. A draft drawn on a financial institution that is signed by the buyer at the time of purchase and again at the time of cashing.

N 7. Issued by post offices, express companies, and telegraph companies to transfer money by mail over long distances.

P 8. A paper that is expressly made payable "at sight," "on demand," or "on presentation."

A 9. "John Q. Public" signed on the back of a check.

Y 10. Payable to order of bearer.

V 11. "Pay to John Q. Public, John Jones."

T 12. Limits the obligation of the endorser.

J 13. Forcing someone to sign a check.

COLUMN 2

(A) blank endorsement
(B) cashier's check
(C) certificate of deposit
(D) certified check
(E) check
(F) comakers
(G) draft
(H) drawee
(I) drawer
(J) duress
(K) forgery
(L) holder in due course
(M) mateial alteration
(N) money order
(O) negotiation
(P) payable on demand
(Q) payee
(R) promissory
(S) protest
(T) qualified endorsement
(U) restrictive endorsement
(V) special endorsement
(W) stop payment
(X) traveler's check
(Y) words of negotiability

COMMERCIAL PAPER (Continued)

M 14. Changing the "Seven" to "Seventeen" on a check.

K 15. Signing another's name to a check, without permission.

H 16. The party who is always directed to pay a check.

F 17. Two or more parties joining in executing a promissory note.

W 18. An order to a bank to refuse payment of a check.

U 19. "For deposit only, John Doe."

O 20. Transfer of commercial paper.

BUSINESS LAW CRITERION-REFERENCED TEST - LEVEL I

BL-I-6 - EMPLOYMENT AND AGENCY

Directions: In the answer column at the left, write the letter that best completes the statement.

C 1. Contracts of employment are usually (A) implied, (B) expressed, (C) a combination of both A and B, (D) none of these.

C 2. An example of an agent is (A) an independent contractor, (B) a file clerk, (C) a cashier, (D) all of these.

B 3. Under common law a worker assumes the risk of (A) working conditions that are unsafe, (B) the ordinary hazards of the industry, (C) inadequate tools and equipment for the job, (D) none of these.

C 4. When an agent commits a tort within the boundries of the agency (A) the agent is liable, (B) the principal is liable, (C) both the agent and principal are liable, (D) neither the agent nor the principal is liable.

C 5. An employer may discharge an employee for (A) joining a union, (B) failing to fulfill the employment obligations, (C) making and receiving excessive personal phone calls, (D) both B and C.

D 6. A worker in a union shop (A) must join the union before being hired, (B) may join the union if he wishes, (C) must join the union immediately upon being hired, (D) must join the union within a stated period of time after being hired.

B 7. When a conflict exists between state and federal law, (A) state law prevails, (B) federal law prevails, (C) the employer gets to choose between them, (D) an impartial third party (arbitrator) decides the dispute without a trial.

A 8. An agency is usually created by (A) express appointment, (B) implied appointment, (C) a third party, (D) another agency.

D 9. An attorney drawing up a contract for a client is a(n) (A) special agent, (B) general agent, (C) employee, (D) independent contractor.

B 10. Business conducted entirely within a state is (A) interstate commerce, (B) intrastate commerce, (C) both A and B, (D) neither A nor B.

B 11. A written statement giving one the authority and power to act in behalf of another is called a(n) (A) agent of power, (B) power of attorney, (C) agency by estoppel, (D) none of these.

A 12. Child labor laws (A) prohibit working in certain jobs, (B) prevent children from performing dangerous jobs for parents, (C) both A and B, (D) neither A nor B.

B 13. When state child labor laws have higher standards than the federal laws, (A) the state laws cannot be enforced by the state, (B) the state laws apply to children in industry within the state, (C) the federal laws will prohibit the state from enforcing the higher standards, (D) all of these.

EMPLOYMENT AND AGENCY (Continued)

B 14. A worker may be hired without regard to union membership in a(n) (A) closed shop, (B) open shop, (C) union shop, (D) all of these.

D 15. Social Security is (A) a fringe benefit, (B) an insurance program paid for by the employee only, (C) an insurance
program
paid for by the employer only, (D) none of these.

B 16. An attempt to force an employer to pay for services not performed or not to be performed is called (A) picketing (B) featherbedding, (C) striking, (D) none of these.

D 17. Labor laws deal with (a) proper working conditions, (B) equal employment opportunities, (C) wages, (D) all of these.

D 18. It is illegal to discriminate against employees because of (A) race, (B) religion, (C) sex, (D) all of these.

B 19. When a union votes to stop working, it is said (A) to be engaging in a lockout, (B) to be out on strike, (C) to be engaging in a primary boycott, (D) all of these.

A 20. Patroling the premises of the business to obtain recognition and to bring pressure on the employer is called a (A) picket, (B) lockout, (C) strike, (D) boycott.

BUSINESS LAW CRITERION-REFERENCED TEST - LEVEL I

BL-I-7 - INSURANCE

DIRECTIONS: Answer each of the following questions. (32 answers)

1. What is a written contract of insurance called?
   a. policy

2. What is the stated amount of a life insurance policy called?
   a. face value

3. Agents usually have power to make a preliminary oral agreement to insure an applicant. What is the written notation on the application called?
   a. binder

4. What is the consideration given by the purchaser of insurance called?
   a. premium

5. What must one have in property or life of individual before insurance can be purchased?
   a. insurable interest

6. What are six kinds of coverage which may be purchased under an automobile policy?
   a. bodily injury
   b. property damage
   c. collision
   d. comprehensive
   e. medical payments
   f. no fault
   g. uninsured motorist

7. While a car is parked at the side of the road, a tree uprooted by the wind crushed the car. What type of insurance must the owner have to
   collect for damages to the car?
   a. comprehensive

INSURANCE (Continued)

8. While driving down the road, the driver loses control of the car and runs into a tree. What type of insurance must the driver have to collect for damages to the car?
   a. collision

9. What type of automobile insurance pays the insured regardless of who causes the accident?
   a. no fault

10. What plan has been devised to provide automobile insurance coverage for drivers who have poor driving records and have been unable to purchase insurance through ordinary procedures?
    a. assigned-risk plan

11. What are the four most common types of ordinary life insurance?
    a. whole life
    b. limited payment
    c. endowment
    d. term

12. Who receives the proceeds from a life insurance policy when the insured dies?
    a. beneficiary

13. What are four types of Social Security coverage?
    a. old-age insurance
    b. survivors insurance
    c. disability insurance
    d. health insurance

14. Who pays the premiums for unemployment compensation?
    a. employer

15. Who finances the OASDHI (Social Security) program?
    a. employers
    b. employees

16. What is the Social Security health insurance program for persons over 65 called?
    a. medicare

INSURANCE (Continued)

17. What is the clause called in a life insurance policy that pays twice as much when the death is accidental?
a. double indemnity

18. When loss occurs, what must the insured do in order to collect under the insurance policy?
a. file a claim

19. Various policies allow for late payment of premium without cancellation. What is this period called?
a. grace period

20. Which type of life insurance provides a 25-year old with the most coverage for the smallest premium at the time of purchase?
a. term

COMPETENCY PROFILE

for

BUSINESS LAW - LEVEL I

Student Name________________________________

Start Date________________________

Completion Date____________________

	(date/initial) QUALIFIED	NOT QUALIFIED
BL-I-1 Legal System		
BL-I-2 Contracts		
BL-I-3 Personal Property		
BL-I-4 Real Property		
BL-I-5 Commercial Paper		
BL-I-6 Employment and Agency		
BL-I-7 Insurance		
BL-I-8 Business Organization		

CERTIFICATE OF COMPETENCY AWARDED____
Date Initials

CERTIFICATE OF COMPETENCY

this is to certify that

____

has demonstrated competence in the skills listed on the reverse side of this certificate in the area of

BUSINESS LAW

______________	______________	______________
Completion date	School	Instructor

LEVEL I (Introduction)

_______ Legal System

_______ Contracts

_______ Personal Property

_______ Real Property

_______ Commercial Paper

_______ Employment and Agency

_______ Insurance

_______ Business Organizations

BUSINESS MATH/MACHINES

DESCRIPTION

An ever-rising tide of paperwork to meet the need for more detailed records and reports by government and business has made business more cost-conscious. Electronic calculators are being integrated with data processing systems as these systems provide more information. This section is designed so that the problems presented can be used for either manual or machine computation.

Outlines of areas to be taught along with some teaching suggestions are offered in each category. For each level of instruction, a pretest has been prepared to give the teacher an indication of an individual student's competency or need for additional instruction in the various areas.

This unit may be useful in preparing students for competing in FBLA/PBL, the Arizona State sanctioned co-curricular student organization. Competitive events: Business Mathematics I, Business Mathematics II, Office Procedures, Business Understanding, Mr. & Ms. FBLA, Mr. & Ms. Future Business Executive, Accounting I, Accounting II.

OVERVIEW OF LEVELS

LEVEL I	LEVEL II	LEVEL III	LEVEL IV
Basic Arithmetic Skills Adding Subtracting Multiplying Dividing Basic Machine Operation Keyboarding (Touch Operation) Auxiliary Keys	Basic Mathematical Skills (Manual or Machine) Computation with Decimals Computation with Fractions Computation with Percentages Metric System Fundamentals Metric Conversion Chart	Interest and Date of Maturity Discounts Precentage of Increase and Decrease Commissions Payroll and Wages Income Tax Bank Reconciliation	Business Problems Solving and Decision Making

BUSINESS MATH/MACHINES - LEVEL I
COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
M/M-I-1	Given 20 addition, subtraction, multiplication, and division problems using whole numbers	the student will manually compute the answers	with 100 percent accuracy.
M/M-I-2	Given 20 problems using addition, subtraction, multiplication, and division of whole numbers	the student will compute all problems using the touch method	with 100 percent accuracy.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
M/M-I-1	Basic Arithmetic Skills Adding Subtracting Multiplying Dividing	M/M-I-1	Use the pretest to diagnose the students' present competencies and weaknesses in basic arithmetic skills. REFER TO: BUSINESS MATH/MACHINES, M/M-5
M/M-I-2	Basic Machine Operation Keyboarding (Touch Operation) Auxilary Keys	M/M-I-2	Instruct students on use of manufacturer's or classroom manual for machine operation including its working parts such as the keyboard and auxiliary keys. After students have reviewed the various parts of the machine, it is important that they develop good work habits such as: 1. Position of the machine and working papers 2. Clearing the machine 3. Positioning the fingers 4. Entering the figures into the machine by the touch method 5. Using needed auxiliary keys with the appropriate finger for the particular make of machine. Make solutions to practice problems available to students. Review the auxiliary keys involved in subtraction, multiplication, and division. Divide class into two teams. Give each member of these teams a worksheet containing the same problems. Students working individually on their own machines pass completed papers upside down to team captain. The team captain who receives all members' papers first claims five points. When all students complete the exercise, team captains return papers to owner. Instructor calls upon students on winning team in random order for answers to problems. Members earn five additional team points for each correct answer. Opposing team members may challenge any answer.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Basic Machine Operation (Continued)		If the challenge is upheld, the right to answer passes to the other team with five points for the correct answer. If the challenge is not upheld, challenging team loses five points to opponents. Give students a worksheet containing identical problems, and ask them to raise their hands when they finish them. When three hands have been raised, call time. Instructor calls on these three students randomly for correct answers. Individual scores are added to team score.

BUSINESS MATH/MACHINES - PRETEST - LEVEL I

Directions: Solve each of the following problems to determine your business arithmetic skill.

Add:

1. 72 25 47 39	2. 847 240 311 568	3. 2,407 1,876 1,922	4. 1,821 1,937 1,776 2,120

Subtract:

5. 39 -26	6. 479 -341	7. 8,207 -5,609	8. 4,211 -3,399

Multiply:

9. 43 X 7	10. 72 X 49	11. 320 X 405	12. 479 X 525

Divide:

13. 357 ÷ 7 = 14. 1,134 ÷ 27 = 15. 2,952 ÷ 246 =

KEY
1. 183 2. 1,966 3. 6,205 4. 7,654 5. 12 6. 138 7. 2,598 8. 812 9. 301 10. 3,528
11. 129,600 12. 251,475 13. 51 14. 42 15. 12

BUSINESS MATH/MACHINES CRITERION-REFERENCED TEST - LEVEL I

M/M-I-1 BASIC ARITHMETIC SKILLS

Directions: Solve each of the following business arithmetic problems.

Add:

1. $\begin{array}{r} 23 \\ 34 \\ 76 \\ \underline{85} \end{array}$

2. $\begin{array}{r} 765 \\ 847 \\ 300 \\ \underline{425} \end{array}$

3. $\begin{array}{r} 827 \\ 419 \\ 326 \\ \underline{555} \end{array}$

4. $\begin{array}{r} 8{,}102 \\ 6{,}454 \\ \underline{3{,}621} \end{array}$

5. $\begin{array}{r} 7{,}247 \\ 8{,}659 \\ 3{,}231 \\ \underline{6{,}032} \end{array}$

Subtract:

6. $\begin{array}{r} 47 \\ \underline{-26} \end{array}$

7. $\begin{array}{r} 348 \\ \underline{-\ 34} \end{array}$

8. $\begin{array}{r} 709 \\ \underline{-257} \end{array}$

9. $\begin{array}{r} 301 \\ \underline{-289} \end{array}$

10. $\begin{array}{r} 3{,}234 \\ -\underline{1{,}987} \end{array}$

Multiply:

11. $\begin{array}{r} 22 \\ \text{X}\ \underline{\ \ 7} \end{array}$

12. $\begin{array}{r} 47 \\ \text{X}\ \underline{28} \end{array}$

13. $\begin{array}{r} 347 \\ \text{X}\ \underline{\ \ 30} \end{array}$

14. $\begin{array}{r} 807 \\ \text{X}\ \underline{356} \end{array}$

15. $\begin{array}{r} 1{,}237 \\ \text{X}\ \underline{\ \ 802} \end{array}$

Divide:

16. 1,218 ÷ 6 =

17. 288 ÷ 32

18. 2,790 ÷ 62 =

19. 1,284 ÷ 107 =

20. 15,525 ÷ 345 =

KEY
1. 218 2. 2,337 3. 2,127 4. 18,177 5. 25,169 6. 21 7. 314 8. 452 9. 12 10. 1,247
11. 154 12. 1,316 13. 10,410 14. 287,292 15. 992,074 16. 203 17. 9 18. 45 19. 12 20. 45

BUSINESS MATH/MACHINES CRITERION-REFERENCED TEST - LEVEL I

M/M-I-2 BASIC MACHINE OPERATION

Add:

1.	2.	3.	4.	5.
981	439	276	444	143
473	967	814	567	420
486	605	211	885	536
257	228	993	113	228
514	356	841	146	689
130	371	909	602	991
262	605	385	251	331
867	345	315	617	655
233	679	661	271	725
927	903	795	702	597

Subtract:

6. 21,456 - 9,349

7. 22,943 -12,807

8. 33,435 - 9,511

9. 14,865 -12,030

10. 3,885 - 967

Multiply:

11. 367 X 109

12. 629 X 339

13. 789 X 574

14. 989 X 47

15. 776 X 297

Divide:

16. 181,503 ÷ 387 =

17. 61,488 ÷ 183 =

18. 219,030 ÷ 98 =

19. 115,752 ÷ 212 =

20. 266,385 ÷ 413 =

KEY

1. 5,130 2. 5,498 3. 6,200 4. 4,598 5. 5,315 6. 12,107 7. 10,136 8. 23,924 9. 2,835
10. 2,918 11. 40,003 12. 213,231 13. 452,886 14. 46,483 15. 230,472 16. 469 17. 336 18. 2,235
19. 546 20. 645

COMPETENCY PROFILE

for

BUSINESS MATH/MACHINES - LEVEL I

Student Name ______________________________

Start Date ______________________

Completion Date ______________________

(date/initial)

QUALIFIED	SCORE	NOT QUALIFIED

BUSINESS MATH

M/M-I-1 Basic Arithmetic Skills

BUSINESS MACHINES

M/M-I-2 Basic Machine Operation

CERTIFICATE OF COMPETENCY AWARDED ______________________________
Date Initials

BUSINESS MATH/MACHINES - LEVEL II

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
M/M-II-1	Given 10 mathematical problems involving computation with decimals	the student will compute the answers either manually or by machine	with 100 percent accuracy.
M/M-II-2	Given 10 mathematical problems involving computation with fractions	the student will compute the answers either manually or by machine	with 100 percent accuracy.
M/M-II-3	Given 10 mathematical problems involving computation with percentages	the student will compute the answers either manually or by machine	with 100 percent accuracy.
M/M-II-4	Given 10 mathematical problems involving the U. S. System and the metric system of measurement	the student will compute the answers either manually or by machine	with 100 percent accuracy.

BUSINESS MATH/MACHINES - LEVEL II

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
M/M-II-1	Basic Mathematical Skills	M/M-II-1	Use the pretest to diagnose the student's competencies and weaknesses in basic mathematical skills. The pretest can be used for either manual or machine computation.
	Decimals Addition Subtraction Multiplication Division Decimal Equivalents Reading of Decimals Rounding of Decimals		Decimals are another way of expressing parts of a whole. If a decimal has a whole number to the left of the point, the whole number is read and written as it is presented; the decimal point itself is read and written as and.
			The decimal part of the number must always end with its decimal place name. This name depends on the number of digits after the decimal point. For example, .7 is read and written as seven-tenths, .08 is read and written as eight-hundredths, and .175 is read and written as one hundred seventy-five thousands. Therefore, the decimal 25.32 would be written and read as twenty-five and thirty-two hundredths. Students need practice in both reading and writing decimals.
			The ability to multiply and divide decimals should be thoroughly understood by students before percentages are taught.
			In teaching the concept of decimal equivalents, the financial pages of the newspaper can be useful. Stock prices from the market reports are quoted in whole numbers for dollars; and fractions, which are decimal equivalents, are used to express cents. A motivational exercise using the market reports is to have students choose a stock and chart the changes for a period of time. Each day the students would figure the value of the stock and the new change. This will give the students practice in converting fractions into decimals; also, they will have to multiply and divide with decimals.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Basic Mathematic Skills (Continued)		
M/M-II-2	Fractions Addition Subtraction Multiplication Division Changing to Higher Terms Reducing to Lower Terms Changing Decimal Fractions into Common Fractions Changing Common Fractions into Decimal Fractions	M/M-II-2	A fraction is a number that is less than a whole number. The number below the line is the denominator and indicates the complete number of equal parts into which the whole quantity has now been subdivided. The number above the line is the numerator and indicates how many of these equal parts are being considered. The line dividing the two numbers means "divided by." Any proper fraction can be converted to its decimal equivalent by dividing the numerator by the denominator and then writing the quotent in decimal form. For example: $2/3 = 3\overset{.6667}{\overline{)2.0000}}$ Decimal Equivalent of 2/3 For students who have difficulty in the basic arithmetic processes using fractions, the teacher may wish to allow students to substitute the decimal equivalents for fractions in solving problems. For machine computation of problems involving fractions, decimal equivalents must be used.
M/M-II-3	Percentages Percent Conversions Finding a Percentage Finding What Percent One Number is of Another Finding a Number When a Percent of it is Given	M/M-II-3	Percentage and percents are used to show the relationship between two numbers in terms which provide more meaningful information. Percentage is a quantity and refers to a part of a whole quantity expressed in relation to 100. The whole quantity is considered 100%. Percent or % is a rate and refers to a fractional or decimal part of one hundred. In working with a problem the % is changed to a decimal. To change a percent to a decimal, remove the percent sign and move the decimal point two places to the left. In computing percentage problems, students may find a method that uses the base, rate, and amount the easiest to follow.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Percentages (Continued)		These three terms represent the following: __Base:__ The number on which the percent is to be calculated. __Rate:__ The number of hundredths taken (Rate is always a %). __Amount:__ The number obtained by multplying the Base by the Rate. Any percentage problems can be solved when two of the three figures are present. The formulas for solving the three most common problems are: To find a certain percent of a number, multiply the number by the percent expressed decimally. (Amount = Rate x Base) Example: Find 20% of 600. Solution: .20 (Rate) x 600 (Base) = 120. To find what percent one number is of another, the amount to which the comparison is made is used as the divisor--(the number preceded by the word "of" is __always__ the divisor). (Rate = Amount ÷ Base) Example: 585 is what % of 1,950? Solution: 585 (Amount) ÷ 1,950 (Base) = .30 or 30%. To find an unknown number when a percent is known, divide the number you know by the percent it is to the unknown. (Base = Amount ÷ Rate) Example: 275 is 20% of what number? 275 (Amount) ÷ .20 (Rate) = 1,375.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
M/M-II-4	Metric System Fundamentals U. S. Terms vs. Metric Terms Basic Metric Units Metric Prefixes	M/M-II-4	Show the similarities in the names of measurement between the U. S. and the metric systems.

United States	Metric
Inches	Millimeters, Centimeters
Inches, feet, yards	Meters
Miles	Kilometers
Ounces	Grams
Pounds	Kilograms
Pints, quarts, gallons	Liters
Degrees, Fahrenheit	Degrees, Celsius

The teacher should be sure to point out that the similarity is in name only and that the distance, weight, volume, or temperature represented by each term is not identical. For example, a mile is about one-third longer than a kilometer.

BASIC METRIC UNITS: Unlike the U. S. System, the metric system has very few units. The following are the metric base units. The kilogram is the metric base unit of weight. A kilogram is equal to a little over two pounds. The kilogram and units based on the kilogram are used instead of ounces and pounds. The meter is the metric base unit of distance. A meter is a little longer than a yard. The meter and a few other units based on the meter are used to measure things now measured in inches, feet, and miles.

The cubic meter is really the metric base unit of volume. For most measurements of volume, however, the liter is used. A liter is equal to a little more than a quart. The liter is used in place of the fluid ounce, the pint, the quart, and the gallon.

The degree Celsius, once called the centigrade degree, is used instead of the Fahrenheit degree to measure temperature.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Metric System (Continued)		METRIC PREFIXES: There are quite a few metric prefixes but the ones most commonly used and in most everyday measurements are: Milli = one one-thousandth or 1/1000 or 0.001 Centi = one one-hundredth or 1/100 or 0.01 Kilo = one thousand or 1000 Prefixes are added to or taken away from the names of the base units to produce larger or smaller metric units. For example: 1 millimeter = 0.001 meter 1 centimeter = 0.01 meter 1 kilometer = 1000 meters 1 gram = 0.001 kilogram REFER TO: BUSINESS MATH MACHINES, p. M/M-15
	Metric Conversion Chart		The metric conversion chart provides an easy way for students to convert from metric to U. S. System and from U. S. System to metric. The chart requires the simple multiplication of decimals (except in conversion of degrees of temperature) to convert from one system to another. The table provideds for approximate conversions only. As more and more consumer products have metric measurements on their labels, it is important that students understand whether they are getting more or less for their money. Sometimes the container may look the same as before metric conversion but have less contents at the same price as when the container was measured by the U. S. System.

BUSINESS MATH/MACHINES - LEVEL II

METRIC CONVERSION CHART[1]

Approximate Conversions from U. S. to Metric and Metric to U. S.

	When You Know:	You Can Find:	If You Multiply By:
Distance	inches	millimeters (mm)	25
	inches	centimeters (cm)	2.5
	feet	meters (m)	0.3
	yards	meters (m)	0.9
	miles	kilometers (km)	1.6
	millimeters (mm)	inches	0.04
	centimeters (cm)	inches	0.4
	meters (m)	inches	39.4
	meters (m)	feet	3.3
	meters (m)	yards	1.1
	kilometers (km)	miles	0.6
Weight (Mass)	ounces	grams (g)	28
	pounds	kilograms (kg)	0.45
	grams (g)	ounces	0.035
	kilograms (kg)	pounds	2.2
Volume	pints	liters (L)	0.47
	quarts	liters (L)	0.95
	gallons	liters (L)	3.8
	liters (L)	pints	2.1
	liters (L)	quarts	1.06
	liters (L)	gallons	0.26
Temperature	degrees Fahrenheit	degrees Celsius (°C)	5/9 (after subtracting 32)
	degrees Celsius (°C)	degrees Fahrenheit	9/5 (then add 32)

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[1] Anne Scott Daughtrey, Robert A. Ristau, S. Joseph DeBrum, General Business for Economic Understanding, 12th Edition, (Cincinnati: South-Western Publishing Company, 1981) p. 611.

BUSINESS MATH/MACHINES - PRETEST - LEVEL II

Directions: Solve the following problems:

1. Write as a decimal the following words: Four Thousand Seven and Thirty-five Thousands ________

2. Write the following decimal in words: 375.006

   ____

3. Which decimal is larger .068 or .0068? ________

4. Add the following numbers: 327.01, 62, .379, 87.1, and 3.41 ________

5. Subtract: 6.8
   -3.716

6. Multiply: 4.37
   X .826

7. Round the answer in No. 6 to three decimal places

   ____

8. Divide: 125)7 Carry answer three places.

9. Divide: .016)4.8

10. Reduce 4/14 to its lowest term. ________

11. Add the following: 1/5 + 3/10 ________

12. Add the following: 3 1/6 + 4 5/6 ________

13. Subtract: 4 1/8
    -1 5/8

14. Multiply: 12 X 5/6________

15. Multiply: 1/4 X 4/5________

16. Divide: 1/8 ÷ 1/4 ________

17. Divide: 5 3/5 ÷ 7/8 ________

18. Convert 3/4 into its decimal equivalent ________

19. Find the fractional equivalent of .625 ________

20. Multiply 45 X 6 7/8 by using the decimal fraction equivalent for 6 7/8 ________

21. Convert 45% to its decimal equivalent________

22. Convert 43% into a common fraction________

23. Convert .485 into its percent equivalent________

24. Find 30% of $90________

25. 72 is ________% of 288?

26. 35 is 7% of what number?________

27. 540 is 180% of what number?________

28. A distance of 340 miles is approximately how many kilometers?________

29. A length of 400 centimeters is approximately how many inches?________

30. A container having a capacity of 30 liters of liquid is capable of holding approximately how many quarts?________

Pretest - Level II (Continued)

KEY
1. 4007.035 2. Three Hundred Seventy-five and Six Thousandths 3. .068 4. 479.9 or 480 5. 3.084
6. 3.60962 7. 3.61 8. .06 9. 300 10. 2/7 11. 5/10 or 1/2 12. 8 13. 2 1/2 14. 10
15. 1/5 16. 1/2 17. 6 2/5 18. .75 19. 5/8 20. 309.375 21. .45 22. 43/100 23. 48.5%
24. 27 25. 25% 26. 500 27. 300 28. 544 km 29. 160 in. 30. 31.8 qt.

BUSINESS MATH/MACHINES CRITERION-REFERENCED TEST - LEVEL II

M/M-II-1 COMPUTATION WITH DECIMALS

DIRECTIONS: Solve the following problems:

1. Write as a decimal the following words: Three Thousand Ten and Twenty-Five Hundredths ____________

2. Write the following decimal in words: 229.004____________

3. Which decimal is larger? .08 or .80 ____________

4. Add the following numbers: 444.05, 37, .019, .009, and 3.2____________

5. Subtract $\begin{array}{r} 7.9 \\ \underline{-2.875} \end{array}$

6. Multiply: $\begin{array}{r} 3.809 \\ \times\ \underline{.347} \end{array}$

7. Round the answer in No. 6 to three decimal places ____________

8. Divide: 8 ÷ 250 (Carry answer to three places) ____________

9. Divide: 7.6 ÷ .019 ____________

10. Find the decimal equivalent of the fraction, 4/5 ____________

KEY
1. 3010.25 2. Two Hundred Twenty-nine and Four Thousandths 3. .80 4. 484.278 5. 5.025 6. 1.321723 7. 1.322 8. .032 9. 400
10. .80

100

M/M-II-2 COMPUTATION WITH FRACTIONS

DIRECTIONS: Solve the following problems:

1. Reduce 3/18 to its lowest term ________________________
2. Add the following: 1/6 + 5/12 ________________________
3. Add the following: 4 1/8 + 7 1/4 ________________________
4. Subtract the following: 6 2/7 - 3 5/7 ________________________
5. Multiply the following: 15 x 2/3 ________________________
6. Multiply the following: 1/3 x 3/5 ________________________
7. Divide the following: 1/3 ÷ 5/12 ________________________
8. Divide the following: 4 1/2 ÷ 5/8 ________________________
9. Convert 5/8 into its decimal equivalent ________________________
10. Find the fractional equivalent of .375 ________________________

KEY

1. 1/6 2. 7/12 3. 11 3/8 4. 2 4/7 5. 10 6. 1/5 7. 4/5 8. 7 1/5 9. .625 10. 3/8

BUSINESS MATH/MACHINES CRITERION-REFERENCED TEST - LEVEL II

M/M-II-3 COMPUTATION WITH PERCENTAGES

DIRECTIONS: Solve the following problems:

1. Convert 62% into its decimal equivalent. ______________________________
2. Convert 83% into a common fraction. ______________________________
3. Convert .725 into its percent equivalent. ______________________________
4. Find 40% of 320. ____
5. A student answered 75% of 120 questions correctly on a test. How many questions were answered correctly? ______________
6. 37 is ________ % of 925?
7. A family has traveled 555 miles on their vacation trip of 1,500 miles. What percent of the total distance have they traveled? ________________
8. 72 is 60% of what number? ________________
9. The school band is raising money for a trip to Disneyland. So far, members have collected $15,975 which is 75% of the goal. How much does the band hope to raise for the trip? ______________________________________
10. 560 is 160% of what number? ______________

KEY

1. .62 2. 83/100 3. 72.5% 4. 128 5. 90 6. 4% 7. 37% 8. 120 9. $21,300 10. 350

BUSINESS MATH/MACHINES CRITERION-REFERENCED TEST - LEVEL II

M/M-II-4 THE METRIC SYSTEM

DIRECTIONS: Using an approximate conversion chart, solve the following problems: (The chart is not needed for all problems.)

1. The distance between two cities in Germany is approximately 320 kilometers. Approximately how many miles is this? _____

2. A distance of 200 centimeters is actually how many meters? ____________________

3. A length of 250 centimeters is approximately how many inches? ____________________

4. Three kilograms is actually how many grams? ____________________________

5. A package weighing three ounces is approximately what weight in grams? ____________________

6. A distance of 500 millimeters is actually what part of a meter? _______________________

7. Which is more three quarts or three liters? ___________________________

8. Some service stations sell gasoline in liters. If you bought 40 liters of gasoline, approximately how many gallons would you have purchased? _________________

9. If the temperature outside is 104° Fahrenheit, what is the temperature on the Celsius scale? ______________________

10. Which of the following prices on ground beef is the cheaper? $2.00 a pound or $4.00 a kilogram? ___________________

KEY
1. 192 miles 2. 2 meters 3. 100 inches 4. 3,000 grams 5. 84 grams 6. 1/2 meter 7. 3 liters 8. 11 gallons 9. 40° Celsius 10. $4.00 a kilogram

COMPETENCY PROFILE

for

BUSINESS MATH/MACHINES - LEVEL II

Student Name______________________________

Start Date____________________

Completion Date____________________

(date/initial)

	QUALIFIED	SCORE	NOT QUALIFIED
M/M-II-1 Computation With Decimals			
M/M-II-2 Computation With Fractions			
M/M-II-3 Computation With Percentages			
M/M-II-4 Metric System			

CERTIFICATE OF COMPETENCY AWARDED______________________________

Date Initials

BUSINESS MATH/MACHINES - LEVEL III
COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
M/M-III-1	Given 10 mathematical problems involving computation of simple interest and dates of maturity	the student will compute the answers either manually or by machine	with 100 percent accuracy.
M/M-III-2	Given 5 mathematical problems involving computation of discount(s)	the student will compute the answers either manually or by machine	with 100 percent accuracy.
M/M-III-3	Given 5 mathematical problems involving computation of percentage of increase and decrease	the student will compute the answers either manually or by machine	with 100 percent accuracy.
M/M-III-4	Given 5 mathematical problems involving the computation of commissions	the student will compute the answers either manually or by machine	with 100 percent accuracy.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
M/M-III-1	Interest and Date of Maturity	M/M-III-1	Students should be taught the formula, I=PRT or INTEREST equals PRINCIPAL times RATE times TIME. Interest is the charge assessed by money-lending agencies for use of borrowed money. Some examples of money-lending agencies are banks, finance companies, savings and loan associations, and credit unions. Principal represents the amount of money borrowed. Rate refers to the percent charged for the amount of money borrowed for one year (per annum). Time is the number of days, months, years or combinations of these for which interest must be paid. Invite a speaker from a local money-lending agency to discuss requirements for and procedures of making a loan. Students should be made aware that in computing interest for days, two methods apply: ordinary interest or exact interest. Ordinary interest is based on the "banker's year" of 360 days. Recently, banks and other lending institutions have been using this method of computing interest only on long-term loans with a principal of $25,000 and over. Exact interest is based on an actual year of 365 days. This method is used in computing the interest on most consumer and automobile loans.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Interest and Date of Maturity (Continued)		Most, if not all, machine manuals provide abundant practice problems to calculate interest for exact number of days if instructor wishes to emphasize this method. Maturity Date is the date a loan matures and must be paid. This date is the same day of the month or year as the date on which the loan is made. If a loan is made on January 1 and is to run one month, it will be due on February 1. If it is to run two months, it will be due on March 1. To find the date of maturity, the exact number of days must be counted when the time is given in days. To do this, (1) find the number of days remaining in the month when the loan was made and (2) add days in the following months until the total equals the stated number of days. Suppose you wanted to find the maturity date of a 60-day loan made on January 3. The problem may be approached as follows: Days Used January 28 (31-3 = 28) February 28 56 March 4 60 60 days
M/M-III-2	Discounts Simple Discount Chain Discounts	M/M-III-2	Simple Discount is normally used in computing cash discount for an early payment of an invoice. An invoice for $500.00 with credit terms of 2/10, n/30 and paid within the discount period would be figured as follows: $500.00 (Gross Amount) x .02 (Rate of Discount) = $10 (Discount). Amount to be paid is $500 - $10 =$490. Students should be taught the meaning of Chain Discounts.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Discounts (Continued)		For example: An item priced at $40.00 less 15%, 10%, and 5% would be figured as follows: $40.00 less 15% means $40.00 (Gross Amount) x .15 (Rate of Discount) = $6.00 (Amount of Discount). $40.00 - $6.00 = $34.00 (Net Amount). Further: $34.00 less 10% means $34 x .10 (Rate of Discount) = $3.40 (Amount of Discount). $34 - $3.40 = $30.60. To Continue: $30.60 less 5% means $30.60 x .05 (Rate of Discount) = $1.53 (Amount of Discount). $30.60 - $1.53 = $29.07 (Net Amount). Students will then be able to understand another concept of Chain Discounts and how to figure it. For example: $40.00 less 15%, 10%, 5% means that the first discount is 5%; the second, is 10%; and the third discount is 15%. To find the Net Amount, use the complementary percentages of each Discount and multiply in succession. (The complement of a number is the difference between that number and the next higher power of 10.) For example: $40.00 x .85 (100-15) x .90 (100-10) x .95 (100-5) = $29.07. If this same Chain Discount was used regularly by a firm, the Net Decimal Equivalent of the Chain Discount would be used when figuring the Net Amount. To obtain this Net Decimal Equivalent, multiply the complementary percentages of each discount in succession (85 x .90 x .95 = .72675.) To find the Net Amount, multiply $40.00 x .72675 = $29.07. (Many texts will encourage students to carry out percentages to the fourth place and then round back to the third.)

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
M/M-III-3	Percentage of Increase and Decrease	M/M-III-3	When comparing figures of a current period to those of a previous period, the percent of increase or decrease can be found by following these steps:

1. Find the difference between the two periods (whether increase or decrease).
2. Divide this figure by the previous period to find the percent of increase or decrease over the previous period.

Naturally, if the current figure is larger than the previous period, the result will be a percent of increase. If the current figure is smaller than the previous period the result will be a percent of decrease.

The following is an illustration of how this process works:

Increase

Current Period	Previous Period	Increase or Decrease	%
1800	1500	+300	+20

$$\frac{1800 - 1500}{1500} = \frac{300}{1500} = .20 = 20\%\ \text{Increase}$$

Decrease

Current Period	Previous Period	Increase or Decrease	%
1200	1600	-400	-25

$$\frac{1600 - 1200}{1600} = \frac{400}{1600} = .25 = 25\%\ \text{Decrease}$$

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
M/M-III-4	Commissions	M/M-III-4	Usually if a person is paid on a commission, payment is made on either a straight commission or a salary plus commission. With either method of payment the commission portion is determined by (1) the quantity of an item sold or (2) a percentage of the sales made. When the commission is based on the quantity sold, the following formula can be used: Rate of Commission x Quantity Sold = Commission When the commission is based on a percentage of the sales made, the following formula may be used: Rate of Commission x Amount of Sales = Commission
M/M-III-5	Payroll and Wages	M/M-III-5	REFER TO: ACCOUNTING, page A-12
M/M-III-6	Income Tax	M/M-III-6	REFER TO: ACCOUNTING, page A-14
M/M-III-7	Bank Reconciliation	M/M-III-7	REFER TO: RECORD KEEPING, page RK-5

BUSINESS MATH/MACHINES - LEVEL III - PRETEST

Directions: Solve the following problems.

1. Find the ordinary interest on a 60-day note for $3,000 at 12%.________
2. Compute the date of maturity on the note in Question No. 1. The note is dated October 28.________
3. Find the exact interest on a 146-day note for $3,000 at 15%.________
4. Compute the date of maturity on the note in Question No. 3. The note is dated July 26.________
5. Find the interest on a five-year note for $10,000 at 18%.________
6. Compute the date of maturity on the note in Question No. 5. The note is dated June 18, 1981.________
7. What is the amount of discount on a $300 invoice with credit terms 3/10, n/30 that is paid within the discount period?________
8. What is the net amount of an invoice for $725 with a 5% discount?________
9. Find the net price on an item listed at $60 less 20% and 10%.________
10. Find the net price on an item listed at $700 less 40%, 10% and 5%.________
11. Employees in the sales department earn a 5% commission on all sales they make. One employee sold $12,500 during one month. What was the amount of the commission earned?________
12. Employees in the sales department earn a 7% commission on all sales over $3,500 a month. One employee sold $7,200 one month. What was the amount of the commission?________
13. What are the gross wages for an employee who works 38 hours at $4.25 an hour?________
14. What are the gross wages for an employee who works 45 hours at $4.00 an hour? Overtime pay is 1 1/2 times the regular hourly pay for all hours over 40.________
15. What are the net wages for an employee who worked 40 hours at $5.00 an hour and who had the following deductions: Federal income tax, $40.00, FICA tax, $13.20, State income tax, $4.00?________

16. What are the proving totals for a bank reconciliation that has the following information: Bank Balance, $425.50, Checkbook Balance, $305.50, Outstanding Checks, $32.85, $77.10, $12.90, Service Charge, $2.85?

____

17. XYZ Company had sales of $200,000 in 1979 and sales of $250,000 in 1980. What was the percent of increase in sales from 1979 to 1980?__________

18. ABC Company had sales of $400,000 in 1970 and sales of $350,000 in 1980. What was the percent of decrease in sales from 1979 to 1980?__________

KEY
1. $60 2. December 27 3. $180 4. November 26 5. $9,000 6. June 18, 1986 7. $9.00 8. $688.75
9. $43.20 10. $359.10 11. $625.00 12. $259.00 13. $161.50 14. $190.00 15. $142.80
16. $302.65 17. 25% 18. 12.5%

BUSINESS MATH/MACHINES CRITERION-REFERENCED TEST - LEVEL III

M/M-III-1 COMPUTATION OF INTEREST

Directions: Solve the following problems.

1. Find the ordinary interest on $8,000 for 3 years at 20%.__________
2. How much interest is earned at the end of the first year?__________
3. What is the total amount of money to be repaid at the end of the third year (provided no payment is made prior to this point)?__________
4. Find the exact interest on $500 for 6 months at 21%.__________
5. What is the interest on a $500 loan for 6 months at 19.2% interest?__________
6. State the maturity (due) date of a 90-day note dated September 2.__________
7. State the maturity (due) date of a 15-day note dated June 1.__________
8. State the due date of a 180-day note dated March 1.__________
9. Find the exact interest on $5,000 at 15% for 73 days.__________
10. State the due date of a 45-day note dated December 1.__________

KEY
1. $ 4,800.00
2. $ 1,600.00
3. $12,800.00
4. $ 52.50
5. $ 48.00
6. December 1

		Days Used
September	28	(30-2 = 28)
October	31	59
November	30	89
December	1	90
	90	days

	Days Used
7. June 16	(15 + 1)

8. August 28

		Days Used
March	30	(31-1 = 30)
April	30	60
May	31	91
June	30	121
July	31	152
August	28	180
	180	days

9. $150.00
10. January 15

		Days Used
December	30	(31-1 = 30)
January	15	45
	45	days

BUSINESS MATH/MACHINES CRITERION-REFERENCED TEST - LEVEL III

M/M-III-2 COMPUTATION OF DISCOUNTS

Directions: Solve the following problems.

1. $250.00 less 15%__________(Amount of Discount)
2. $500.00 less 20%__________(Net Amount)
3. $300.00 less 20%, 15%, 10%__________(Net Amount)
4. $600.00 less 15%, 10%, 5.5%__________(Show only the Net Decimal Equivalent that would be used in determining the Net Amount.)
5. $2,000.00 less 20%, 10%, 5%__________(Show only the Net Decimal Equivalent that would be used in determining the Net Amount.)

KEY
1. $37.50
2. $400.00
3. $183.60
4. .722925
5. .684

BUSINESS MATH/MACHINES CRITERION-REFERENCED TEST - LEVEL III

M/M-III-3 COMPUTATION OF PERCENTAGE OF INCREASE AND DECREASE

Directions: Find the percent of increase or decrease in the following items:

	1979	1980	Increase or Decrease	%
1.	$330,000	$360,000	______	______
2.	420,000	432,600	______	______
3.	210,000	180,000	______	______
4.	50,000	175,000	______	______
5.	850,000	833,000	______	______

KEY
1. +$30,000, 9%
2. +$12,600, 3%
3. -$30,000, 14.2% or 14.3%
4. +$125,000, 250%
5. -$17,000, 2%

BUSINESS MATH/MACHINES CRITERION REFERENCED TEST - LEVEL III

M/M-III-4 COMPUTATION OF COMMISSIONS

Directions: Solve the following problems.

1. A salesperson receives a commission of $2.50 for each item that is sold. During one month this person sold 335 items. What was the amount of the commission?_________

2. A real estate broker receives a 3% commission on all land sales made by the company. During one month all of the salespeople sold $525,000 worth of land. How much was the broker's commission?_________

3. If a person receiving a salary of $176 a week plus a 4% commission on all sales sold $3,725 during one week, how much were the gross earnings for the week?________

4. If you had a weekly salary of $300 and a 1/2% commission on all sales over $1,300, what would your gross pay be if you sold $2,200 one week?_________

5. In the housewares department of a store, the sales clerks receive a 20% commission on each $30 skillet they sell during a special sale. One sales clerk sold 42 skillets, what was the amount of the commission?_______

KEY
1. $837.50
2. $15,750.00
3. $325.00
4. $304.50
5. $252.00

COMPETENCY PROFILE

for

BUSINESS MATH/MACHINES - LEVEL III

Student Name____ Start Date______________________________

Completion Date______________________________

(date/initial)

	QUALIFIED	SCORE	NOT QUALIFIED
M/M-III-1 Interest and Date of Maturity			
M/M-III-2 Discounts			
M/M-III-3 Percentage of Increase and Decrease			
M/M-III-4 Commissions			

CERTIFICATE OF COMPETENCY AWARDED____
Date Initials

BUSINESS MATH/MACHINES - LEVEL IV
COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
M/M-IV-1	Given 10 business problems	the student will solve the problems either manually or by machine	with 100 percent accuracy.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
M/M-IV-1	Business Problems		The pretest should be administered to give the teacher an indication of the students' competencies or deficiencies. All of the material in the pretest is based on areas covered in Levels I, II, and III. After the pretest has been scored, the teacher may wish to go over the areas in which students appear to be having difficulty. The students may benefit from reworking parts of the pretests in any level in which they are having difficulty. A survey of Arizona businesspersons indicated that they believed that while students may know the basic mathematical processes, they do not always know how to apply them in problem-solving situations. Students may find it helpful to make up their own business problems to be solved by others. The problems should be prepared only in those areas in which a student is having difficulty. Collect newspaper advertisements and have students calculate percent of savings on sale items, new markdown prices, etc. Assign students to interview local business employees and learn what types of problem-solving they must do on their job. Assign students to compare interest rates at a local car dealer , bank, and credit union and calculate savings on lowest rate.

BUSINESS MATH/MACHINES PRETEST - LEVEL IV

DIRECTIONS: Solve the following problems.

1. A store bought 100 dozen men's shirts at $79.20 a dozen and marked them to sell for $9.95 each. During the season, 1,100 shirts were sold at that price. The remaining shirts were closed out at the end of the season at $7.95 each. What was the gross profit on the entire lot? ______________________

2. To make a set of shelves, you need 4 pieces of shelving. Each piece is 3.5 meters long. At $2 a meter, what will be the cost of the shelving? ______________________

3. A customer bought pieces of fabric of the following lengths: muslin, 2 meters; taffeta, 3.75 meters; gingham, 5.5 meters; knit, 4 meters. Approximately how many feet of material were purchased? (Round your answer to the nearest foot.) ______________________

4. You are employed as a clerk in the electrical appliance department of a department store. Your supervisor asks you to lower prices on the following items: Model A toaster, 30%; Model C electric skillet, 15%; and Model XX electric mixer, 12.5%. What will the new prices of the appliances be?

ITEM	REGULAR PRICE	MARKDOWN	SALE PRICE
Model A Electric Toaster	$25.00	30%	__________
Model C Electric Skillet	$40.00	15%	__________
Model XX Electric Mixer	$80.00	12.5%	__________

5. The Johnson family borrowed $4,000 to buy a car. They were told that they would have to pay interest at 20% for their three-year loan.

   A. How much interest will the Johnson family have to pay for the three-year loan? ________________

   B. If they arrange to pay the interest yearly, how much will they have to pay each year? ____________

   C. If they do not elect to pay the interest until the maturity date, what is the total amount that will have to be paid when the note is due? ______________________________

6. A sporting goods store had sales of $45,000 during the month of June. The owner told the employees that their goal for July was to increase sales by 20%. The sales for July amounted to $55,000. Did the store meet the goal for July? ________ If the store met the goal, by how much did they exceed their goal? __________ If the store did not meet the goal, by how much were they short? ________

7. Employees in a store are paid a weekly salary plus a 5% commission on all sales over $1,500. Compute the gross earning for each of the employees listed below:

EMPLOYEE	WEEKLY SALARY	SALES	GROSS EARNINGS
Jones	$600	$1,800	
Wilson	$750	$2,100	
Ellis	$450	$1,300	

8. Compute the net price of the following items:

ITEM	LIST PRICE	CHAIN DISCOUNT	NET PRICE
Television Set	$850	less 20% and 10%	
Refrigerator	$700	less 20%, 15%, 5%	
Typewriter	$475	less 40%, 25%, 10%	

9. A company spent $4,200 for advertising for one quarter of a year. This was 3/8 of the amount allowed for advertising for the entire year. What was the annual amount allowed? ________________

10. Cardinal Company had sales of $300,000 in 1979 and sales of $420,000 in 1980. What was the percent of increase in sales from 1979 to 1980? ____________

KEY: 1. $3,820 2. $28 3. 50.325 feet 4. Model A, $17.50; Model C, $34.00; Model XX, $70.00 5. (a) $2,400 (b) $800 (c) $6,400 6. yes; $1,000 7. Jones, $615; Wilson, $780; Ellis, $450 8. Television, $612; Refrigerator, $452.20; Typewriter, $192.37 9. $11,200 10. 40%

BUSINESS MATH/MACHINES CRITERION-REFERENCED TEST - LEVEL IV

DIRECTIONS: Solve the following problems.

1. A store bought 15 dozen pairs of work boots at $10.80 per pair. The store sold 150 pairs at $16.20 a pair and the rest at $13.60 a pair. What was the gross profit on the entire lot? ____________________

2. At a yard goods store, a customer buys 8 3/4 yards of fabric at $3.20 a yard. What was the total amount of the sale? ________

3. You are working as a stock clerk in a local store. Your supervisor asks you to put the price tags on three different models of transistor radios. Model A is to be priced 35% over the wholesale price, Model B, 30%; Model C, 45%. Compute the retail prices to be put on the price tags according to the information given below.

MODEL	WHOLESALE PRICE	MARKUP RATE	RETAIL PRICE
Model A	$16	35%	______________
Model B	$24	30%	______________
Model C	$38	45%	______________

4. At the beginning of a season, a family had 400 liters of fuel oil on hand. They purchased 3,600 liters during the season, and had 200 liters on hand at the end of the season. At 40¢ per liter, what was the total fuel cost for the season? Approximately how many U. S. gallons were used? ______________________

5. The sales manager of a store has instructed several of the departments that they must increase their sales by 30% next month. One of the departments, the shoe department, had sales of $18,000 this month. How much will the shoe department have to sell next month to increase their sales by 30%? ___________________

6. The Charger Company had sales of $550,000 in 1979 and sales of $440,000 in 1980. What was the percent of decrease in sales from 1979 to 1980? __________________________

7. A salesperson working on a straight commission basis gets $440 commission on sales of $5,500. What is the percent of the commission? __________________

BUSINESS MATH/MACHINES CRITERION-REFERENCED TEST (Continued)

8. The interest on a loan of $2,000 for two months was $40. What annual rate of interest was charged? ________

9. The PDQ Corporation has prepared a budget of $750,000 for next year. Listed below are three departments and the percent of the budget that they will have to operate on next year. Compute the amount that each of the departments will have to operate on next year.

DEPARTMENT	PERCENT OF BUDGET	BUDGET ALLOWANCE
Personnel Department	12%	________
Sales Department	22%	________
Advertising Department	27.5%	________

10. Compute the net price of the following items:

ITEM	LIST PRICE	CHAIN DISCOUNT	NET PRICE
Electric Range	$ 800	less 30% and 20%	________
Video Tape Recorder	$1,200	less 40%, 20%, 5%	________
Pinball Machine	$1,750	less 30%, 20%, 10%	________

KEY: 1. $894 2. $28 3. Model A, $21.60; Model B, $31.20; Model C, $55.10 4. $1,520; 988 gallons 5. $23,400 6. 20% 7. 8% 8. 12% 9. Personnel, $90,000; Sales, $165,000; Advertising, $206,250 10. Range, $448; Video Recorder, $547.20; Pinball, $882.

COMPETENCY PROFILE

for

BUSINESS MATH/MACHINES - LEVEL IV

Student Name____

Start Date________________________

Completion Date____________________

(date/initial)

	QUALIFIED	SCORE	NOT QUALIFIED
M/M-IV-1 Business Problems			

CERTIFICATE OF COMPETENCY AWARDED____

Date Initials

CERTIFICATE OF COMPETENCY

this is to certify that

has demonstrated competence in the skills listed on the reverse side of this certificate in the area of

BUSINESS MATH/MACHINES

Completion date

School

Instructor

LEVEL I

Basic Arithmetic Skills ______

Basic Machine Operation ______

LEVEL II

Computation With Decimals ______

Computation With Fractions ______

Computation With Percentages ______

Metric System ______

LEVEL III

Interest and Date of Maturity ______

Discounts ______

Percentage of Increase and Decrease ______

Commissions ______

LEVEL IV

Business Problems ______

BUSINESS ORGANIZATION AND MANAGEMENT

DESCRIPTION

Students should have exposure to the business world and an understanding of how American businesses are organized. This knowledge will help the student to interpret the potential of that business in regard to control, expansion, credit capability, and size. Students should also acquire some concept of how business is managed.

The duties of management are complex; however, an acquaintanceship with some fundamentals of the management process will help the student understand problems that confront managers, owners, and operators. The student should also understand where to go for problem solution in any business organization.

This unit may be useful in preparing students for competing in FBLA/PBL, the Arizona State sanctioned co-curricular student organization. Competitive events: Job Interview, Office Procedures, Mr. and Ms. FBLA, Mr. and Ms. Future Business Executive, and Business Administration.

OVERVIEW OF LEVELS

LEVEL I	LEVEL II	LEVEL III	LEVEL IV
Ownership of Business Sole Proprietorship Partnership Corporation Cooperative Fundamentals of Business Management Functions of Management Types of Organization Characteristics of Good Management	Fundamentals of Personnel Management Recruitment Selection Training Evaluation Wages and Salaries Decision-Making Process Survey Method Fact-finding Method Channels of Communication Downward Communication Upward Communication Intraorganizational Communication Extraorganizational Communication		

BUSINESS ORGANIZATION AND MANAGEMENT - LEVEL I

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
O/M-I-1	Given a list of ten characteristics of business ownership	the student will be able to match each characteristic with the appropriate form of business ownership	with 70 percent accuracy.
O/M-I-2	Given the words: sole proprietorship, partnership, corporation, and cooperative	the student will list two advantages and two disadvantages of each	with 80 percent accuracy.
O/M-I-3	Given a list of management function descriptions	the student will correctly identify the function with a description	with 80 percent accuracy.
O/M-I-4	Given two organizational charts	the student will distinguish between a line organization and a line-staff organization	with 100 percent accuracy.
O/M-I-5	Given a list of five characteristics of good management	the student will be able to match each characteristic with the appropriate definition	with 60 percent accuracy.

BUSINESS ORGANIZATION AND MANAGEMENT - LEVEL I

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
O/M-I-1	Ownership of Business Sole Proprietorship Partnership Corporation Cooperative	O/M-I-1	Discuss the nature, advantages, and disadvantages of each type of ownership. Reproduce articles of incorporation taken from a local newspaper. Have students obtain pertinent information such as the name of the corporation, its officers, and its purpose for incorporating. Invite a lawyer to discuss the procedures to be followed in obtaining and maintaining a corporate charter. Discuss differences in control of a cooperative and a corporation (one man, one vote versus one share, one vote).
O/M-I-2	Advantages and Disadvantages		Invite the owner of a sole proprietorship business to discuss the reason the business is operated as a sole proprietorship rather than as a partnership or a corporation. Conduct a survey among class members to find out whether they would prefer to work for a small company, large corporation, or their own business. Have students discuss reasons for their selections. REFER TO: ACCOUNTING, p. A-21-22, 26-28

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
O/M-I-3	Functions of Management Planning Organizing Staffing Directing Controlling	O/M-I-3	List the functions of management on the chalkboard or on a transparency, and describe the activities performed under each function. Invite a manager or owner of a local business to come in and describe how the various functions are carried out in the organization. Have students plan a future unit of study such as banking, credit, or insurance, applying the five managerial functions Invite a school administrator into the classroom to show how the five management functions are being used to carry out a school program or goal. Provide students with case studies for classroom or group discussion. Discuss the wisdom of involving subordinates in goal setting and work planning. Discuss the difference between ownership and management. Invite a graduate of your high school who is in a management position or who may own a small business enterprise to discuss problems of operating a business.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
O/M-I-4	Types of Organization Purpose of Organization Chart Line Organization Line-Staff Organization	O/M-I-4	Have students prepare a line organization chart for management within the local school. Have students prepare a line-staff chart for management within the local school. Give examples of organization charts as a basis for discussion of line organization and line-staff organization and the reason each evolves. Have students prepare an organization chart of a business with which they are familiar. Invite the manager of a store, office, or industry to visit the class to illustrate the chain of command within the organization. Ask the speaker to show students how, by using the chain-of-command chart, they could find the correct person to contact for specific information about the speaker's business.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
O/M-I-5	Characteristics of Good Management Authority Accountability Unity of Command Span of Control	O/M-I-5	Discuss the difference between responsibility (assigned) and authority (delegated). Discuss responsibility, authority, and accountability within the classroom illustrated by an organizational chart. Use case studies or role playing to illustrate problems when one person has more than one supervisor (unity of command). Discuss waste of valuable executive time if too few are under the executive's supervision and the inability of an executive to supervise too many (span of control). Use case studies to clarify the degree of accountability of supervision for actions of subordinates.

BUSINESS ORGANIZATION AND MANAGEMENT - CRITERION-REFERENCED TEST - LEVEL I

O/M-I-1 OWNERSHIP OF A BUSINESS

Directions: Select from column 1 the term that matches the meaning in column 2. Write the letter from column 1 in the blank provided. Some descriptions may have more than one answer.

COLUMN 1

A. Sole Proprietorship
B. Partnership
C. Corporation
D. Cooperative

COLUMN 2

___1. Must be chartered by the state

___2. One man, one vote

___3. One owner is legally liable for actions of the other

___4. One vote for each share of stock owned

___5. Most common form of business ownership

___6. Written agreement between owners

___7. Legally a person (entity) in the eyes of the law

___8. Owner makes all decisions

___9. May be organized for a specific group of people to help in marketing or processing their products

___10. May have thousands of owners

KEY

1. C or D
2. D
3. B
4. C
5. A
6. B
7. C or D
8. A
9. D
10. C or D

NOTE: Only one answer should be required on Numbers 1, 7, and 10.

BUSINESS ORGANIZATION AND MANAGEMENT - CRITERION-REFERENCED TEST - LEVEL I

O/M-I-2 OWNERSHIP OF BUSINESS

Directions: List two advantages and two disadvantages for each of the following types of business ownership:

Sole Proprietorship
Partnership
Corporation
Cooperative

KEY

SOLE PROPRIETORSHIP

Advantages to Owner:

1. Easy to form
2. Requires little capital
3. Retains all profits
4. Has complete control

Disadvantages to Owner:

1. Must make all decisions
2. Management limited to ability
3. Personally responsible for actions against the business
4. Suffers total loss if business fails
5. Expansion of business limited

PARTNERSHIP

Advantages to Owners:

1. Workload shared
2. More capital available for expansion
3. Legal agreement between partners
4. Credit easier to obtain (owners' personal liability for debt)

Disadvantages to Owners:

1. Unlimited liability for partners
2. Personal conflicts may limit effectiveness
3. Limited number of owners can partcipate

CORPORATION

Advantages to Owners:

1. Legally a person in the eyes of the law
2. Provides for large-scale operation
3. No Unlimited Liability
4. Limited loss if corporation fails

Disadvantages to Owners:

1. Possible heavy income tax burden
2. Incorporation cost high
3. Majority of stockholders control corporation
4. Government regulations more restrictive

COOPERATIVE

Advantages to Owners:

1. Legally a person in the eyes of the law
2. Single stockholder control impossible
3. Organized to benefit special groups
4. Limited loss if cooperative fails

Disadvantages to Owners:

1. Possible heavy tax burden
2. Organizing may be difficult and expensive
3. Owners do not have control over decisions made each day unless they are officers of the cooperative

BUSINESS ORGANIZATION AND MANAGEMENT - CRITERION-REFERENCED TEST - LEVEL I

O/M-I-3 FUNCTIONS OF MANAGEMENT

Directions: Select from Column 1 the term that matches the meaning in Column 2. Write the letter from Column 1 in the blank provided.

A. Planning
B. Organizing
C. Staffing
D. Directing
E. Controlling

______1. Recruiting, selecting, and providing compensation for personnel to carry out the goals and objectives of business

______2. The process of monitoring and evaluating how well the goals and objectives are being met

______3. The process of determining the goals and objectives which will govern the future action, events, and activities of the business

______4. The process of establishing policies, procedures, and systems to carry out the goals and objectives of the business

______5. Leading, motivating, and communicating with employees to carry out the goals and objectives of the business

KEY

1. C
2. E
3. A
4. B
5. D

BUSINESS ORGANIZATION AND MANAGEMENT CRITERION-REFERENCED TEST - LEVEL I

O/M-I-4 TYPES OF ORGANIZATION TEST

Directions: Indicate which of the following charts shows line organization and which shows line-staff organization by filling in the appropriate statement.

1. Chart A is an illustration of ______________________________authority.
2. Chart B is an illustration of ______________________________authority.

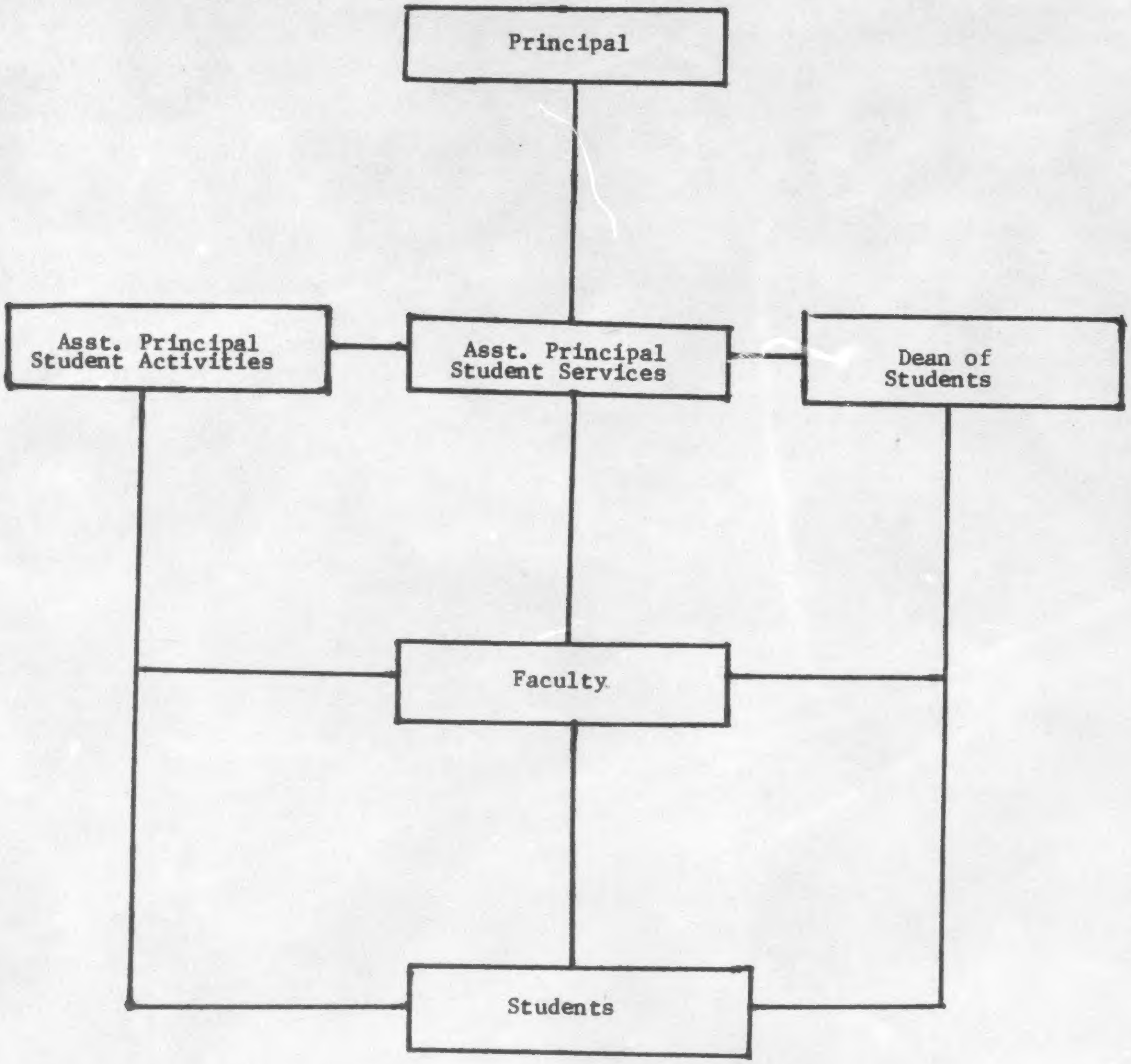
Principal
Asst. Principal Student Activities
Asst. Principal Student Services
Dean of Students
Faculty
Students

CHART A

O/M-10

O/M-I-4 TYPES OF ORGANIZATION TEST (CONTINUED)

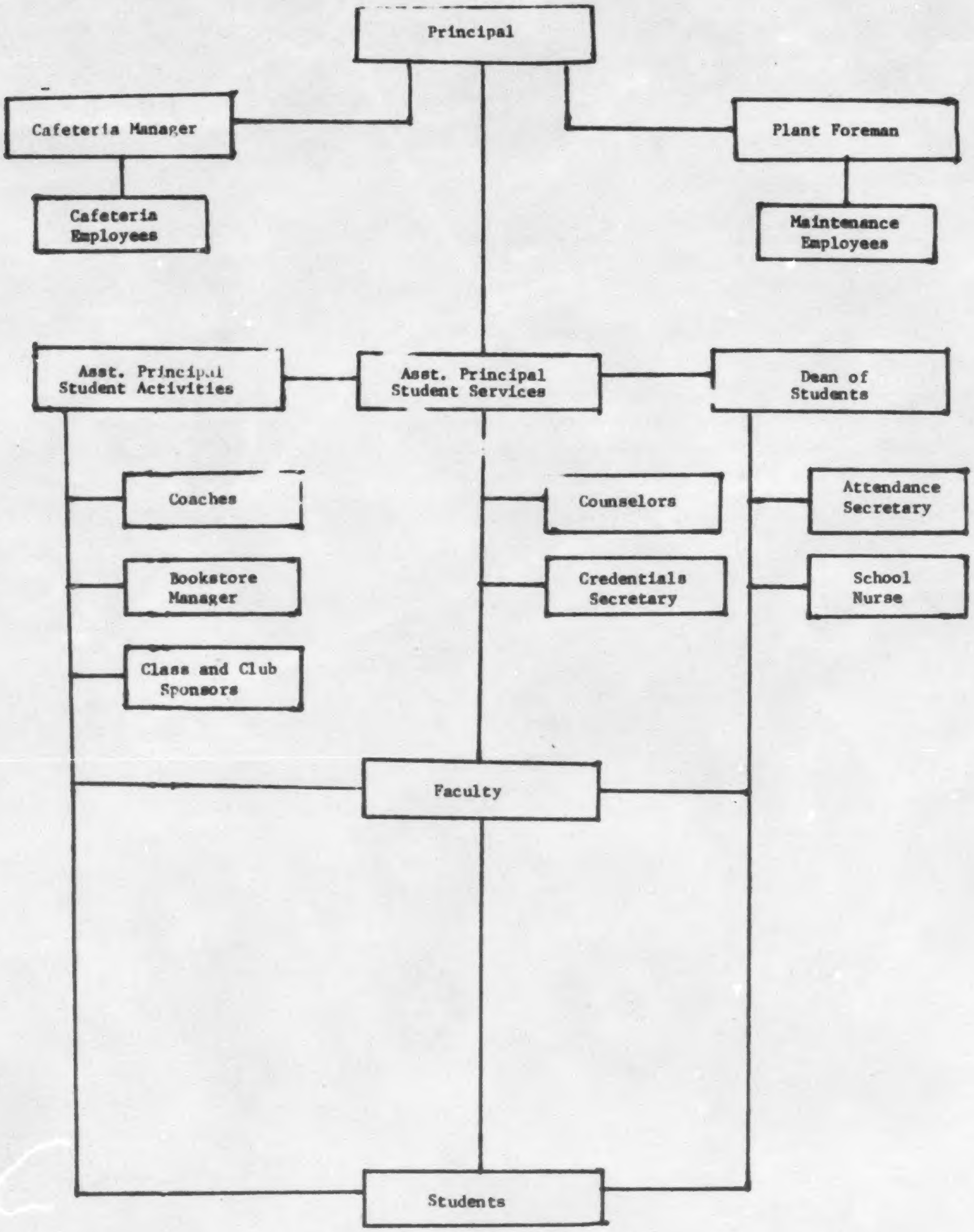

CHART B

BUSINESS ORGANIZATION AND MANAGEMENT - CRITERION-REFERENCED TEST - LEVEL I

O/M-I-5 CHARACTERISTICS OF GOOD MANAGEMENT

Directions: Select from Column 1 the term that matches the meaning in Column 2. Write the letter from Column 1 in the blank provided.

A. Accountability
B. Span of Control
C. Responsibility
D. Authority
E. Unity of Command

___1. The obligation of an employee to perform an assigned task
___2. The right of persons to take action and to make the necessary decisions for completing the tasks assigned to them
___3. The responsibility to a superior for doing an assigned task well
___4. The number of individuals a manager can personally and directly supervise effectively
___5. The implication that conflict arises when an employee is accountable to more than one supervisor

KEY

1. C
2. D
3. A
4. B
5. E

COMPETENCY PROFILE

for

BUSINESS ORGANIZATION AND MANAGEMENT - LEVEL I

Student Name ______________________________

Start Date ______________________

Completion Date ______________________

	(date/initial)		
	QUALIFIED	SCORE	NOT QUALIFIED
O/M-I-1 Characteristics of Business Ownership			
O/M-I-2 Advantages and Disadvantages of Types of Business Ownership			
O/M-I-3 Descriptions of Management Functions			
O/M-I-4 Types of Business Organization Charts			
O/M-I-5 Characteristics of Good Business Management			

CERTIFICATE OF COMPETENCY AWARDED ______________________________
Date Initials

BUSINESS ORGANIZATION AND MANAGEMENT - LEVEL II

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
O/M-II-1	Given ten descriptions of the personnel management process	the student will be able to match the description with the appropriate area of personnel management	with 60 percent accuracy.
O/M-II-2	Given the five steps of the fact finding process in decision making	the student will be able to list the steps in their proper order	with 100 percent accuracy.
O/M-II-3	Given ten instances of types of communication	the student will be able to identify the channel of communication being used	with 80 percent accuracy.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
O/M-II-1	Personnel Management Recruitment	O/M-II-1	Bring to class advertisements that illustrate recruitment announcements. Discuss the information and design of the advertisements.
			Invite a personnel officer of a major employer to discuss the techniques used in recruiting personnel.
			Invite a representative from the Department of Economic Security to discuss recruitment techniques.
			Have the class design a recruitment announcement to hire a teacher for this particular class.
			If the local school or district has a Placement/Career Office, invite the director in to discuss recruitment techniques used by various companies to recruit students.
	Selection		Some questions to be asked in the selection process are: 1. Can the applicant do the job? 2. Will applicant accept and be accepted by employees of the company? 3. Will applicant expect supervision or will responsibility be taken? 4. How important is the investigation of a prospective employee's personal and job-related references?
			Have class or small-group discussion on how these questions can be used to help the prospective employer select the right applicant for the job.
			Have class, group or teams interview a business person or personnel manager of a small company to determine the qualities that are considered in selecting a new employee.
			Discuss the implications of the affirmative action law.
			REFER TO: APPLYING FOR A JOB, p. JA-4

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Personnel Management (continued) Training		To illustrate the training process, divide the class into several groups and have each group teach the rest of the class a simple skill (tie a tie, correct a typing error, prepare a journal) using the following process: 1. Determine what the individual(s) know(s) about the skill to be taught. 2. Demonstrate the skill. 3. Permit the individual(s) to perform the skill with supervision. 4. Allow individual(s) to perform the skill without supervision. 5. Evaluate what additional training is needed and repeat the process from skill demonstration until mastery of the skill is achieved.
	Evaluation		Bring to class sample evaluation instruments used by the school for evaluating teachers, administrators, and other classified personnel. Review the areas that are covered on the evaluation sheet. If possible, include evaluation forms from various businesses. Divide the class into groups and have them devise an evaluation form for any position in the school or for officers of the local FBLA/PBL chapter. HINT: Teacher may wish to lead a discussion emphasizing that attitude, adherence to company rules and regulations, and work habits are equally important to job knowledge and qualifications in evaluating employee performance.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Personnel Management (continued) Wages and Salaries		Have students prepare a list of factors to be considered in determining employee wages. Some of the items that may be included are: 1. Minimum wage 2. Employee's skill 3. Employee's experience 4. Supply and demand for a particular skill 5. Prevailing wage in the community 6. Employee fringe benefits and cost to the company in reduced profits 7. Employee retention 8. Ambition 9. Payroll costs, i.e., FICA, workmen's compensation, and state unemployment 10. Full time or part time Discuss the concept of high pay/employee retention versus low pay/high employee turnover. (Which is more costly to the business?)
O/M-II-2	Decision-Making Process Survey Method Fact-Finding Method	O/M-II-2	Explain to students that the simplest process used in decision making is known as the survey method. This method is usually devoid of any form of scientific or fact-finding approach, and the decision maker usually must rely upon previous experiences, judgment, intuition, and hunch. Explain to students the steps in the fact-finding method. These steps are: 1. Identification of the problem 2. Pertinent facts relating to the problem 3. Analysis of the problem 4. Possible solutions and ramifications 5. Best solution and defense To illustrate the use of the fact-finding method, the case problem "Trip To The Moon" may be used. The class should first be led in a discussion using the five parts of the fact-finding method in prioritizing the available items in the case problem.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Fact-finding Method (continued)		1. Identification of the problem. The problem is that you are on the moon and you are 200 miles from your rendezvous and have only certain items available that you can take with you. The decision must be made as to which items are most important to safety and preservation of life. 2. Pertinent facts. Some of the facts that may be considered are atmospheric conditions on the moon and distance to be traveled. 3. Analysis of the problem. The problem is that there are certain items that are more important to safe arrival than are others, and a decision must be made as to which items are more important. 4. Possible solutions: A possible solution is for you and the rest of the crew using all of their scientific knowledge concerning conditions on the moon to achieve a consensus of which items are important to survival. Another possible solution would be if the radio on the space ship is operable to radio the mother ship and ask the crew to come to help. A third possible solution would be to take all supplies regardless of their value for moon survival even though it may increase travel time significantly. 5. Best solution: The best solution is going to be based on the decision to take those items which are necessary for survival and leave those which because of conditions on the moon will not be of any help. After the fact-finding process has been discussed with the students, ask them to follow the instructions given in the case problem and determine in rank order the value of each of the items for survival in making the 200-mile journey across the moon. After the students have completed ranking the items, the key should be used to illustrate to students how a careful use of the facts would make solving the problem easier. REFER TO BUSINESS ORGANIZATION AND MANAGEMENT, p. O/M-24.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Decision-Making Process (continued)		The case study method provides an opportunity to aid students in the fact-finding step of decision making. With this method, students are given a basic problem with a minimum of information. They must then question parties who have the necessary information in order to reach a decision. The case study method combined with a role-playing situation may provide an excellent experience for this unit. Given a particular work situation dealing with conflict or change, students assume the role of personnel manager for a particular organization. Two students are chosen before class to represent the opposing sides of the conflict. They are briefed by the teacher as to their particular positions and are then given suggestions and/or the freedom to embellish the given facts in a role-playing situation. The remaining students, acting individually as personnel managers, are given a very brief case study which describes the conflict situation. They are allowed to call in and question, separately, the two students who have been briefed by the teacher. This questioning allows the students to determine additional facts and circumstances in the case. The students are then required to prepare a clear, concise summary of the situation. In this summary the student should be able to identify the problem, explain how information relating to the problem was gathered, and analyze the causes of the problem. More importantly, the student should be able to identify and weigh alternative solutions and select and defend an appropriate solution to the problem. REFER TO: BUSINESS ORGANIZATION AND MANAGEMENT p. 20 FOR SAMPLE OF CASE STUDY

CASE STUDY

Lillian O'Hara and Suzanne Matthews

STUDENTS ARE GIVEN THE FOLLOWING INFORMATION: Lillian O'Hara and Suzanne Matthews are employed by Kraft Department Stores. Lillian works in stationery, which is located next to the housewares department where Suzanne works.

Because Suzanne and Lillian are friends and knowledgeable about each other's department, they very often cover for one another if it is necessary for one of them to leave the sales floor. However, in the past few months Suzanne has increasingly taken advantage of Lillian in this respect. She overstays her break, returns late from lunch, etc.

Lately, Suzanne has refused to help several customers in Lillian's department when Lillian was busy. The customers have been complaining of the service in these departments. The manager has noticed the sloppy appearance of the departments that were previously the most attractive in the store. It has become apparent to the manager that trouble has arisen between Lillian and Suzanne. He has overheard "grapevine rumors" about this. In any case, he is upset because their personal problems are beginning to affect their work and he has asked you to speak to both of these employees to resolve this conflict.

LILLIAN WILL BE TOLD: You are being taken advantage of by Suzanne. She extends her break beyond the given time, takes extra time at lunch, and now she wants you to clock her out at night so she can sneak out early. Of course, you said no, and now she refuses to help when you are swamped with customers or to straighten your department on your day off. In fact, you are beginning to suspect that she intentionally messes it up. Other employees are becoming aware of the difficulties between you and are gossiping.

SUZANNE WILL BE TOLD: You haven't been feeling well and therefore overstayed your break a few times. Your family is having personal difficulties that you don't care to tell anyone about, and they necessitated your taking a little extra time at lunch. You have taken all your personal time and sick leave, and now these difficulties make it necessary for you to take more time. You feel the store won't be receptive to your needs even though you have always been a good worker because they refused you a raise that you requested last month. You asked Lillian to clock you out one day so you could slip out ten minutes early, and she got steamed up about how you are taking advantage of her. Now she has refused to help out in your department, so you have stopped helping her. To make matters worse, everyone is gossiping about your differences, which you don't like at all; and you are both being called into the personnel office.

PROCEDURE: Suzanne and Lillian will be called into the classroom indivdually, and students (personnel managers) will be able to question them. Then the students will be called upon to list pertinent facts they have gathered and to suggest solutions to this problem.

At this point, students will be given a written assignment to be set up as follows:

I. Identification and summary of the problem
II. Fact-finding methods and pertinent facts
III. Analysis of problem
IV. Possible solutions and ramifications of each
V. Best solution and defense

This type of problem need not turn into a major production taking up an inordinate amount of time. It could reasonably be completed in 1-3 class periods based on the type and complexity of the problem the teacher develops.[1]

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[1] Marilyn V. Rosas, "Teaching Decision-Making in Business Dynamics Course," Business Education Forum, 35:13-16, March, 1981

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
O/M-II-3	Communication Channels in the Organization Downward Upward Intraorganizational Extraorganizational	O/M-II-3	Discuss with the class the types of communication that evolve from each of the formal channels. The following are suggested definitions and channels: Downward Channels. Objectives, policies, directives, and decisions that are issued from the chief executive down to immediate subordinates who in turn send the communication downward until it reaches the lowest-level subordinate. Examples might be changes in company written policy issued by the chief executive directing department managers that due to economic conditions they must reduce their individual staffs by 10 percent. Upward Channels. The process through which communication flows from subordinate through managers up to the chief executive. Many times upward channels will carry information on the progress toward fulfilling the action requested from previous directives. One disadvantage in the upward channel of communication is evident when there are several layers of management. As the communication filters upward, its content may be diluted before it reaches the chief executive. An example of upward communication might be an individual salesperson reporting how well a sales goal is being met to a manager and the manager in turn reporting the progress of all salespersons to the superior. Another example might be the use of a "suggestion box" by lower echelon workers to inform top management of their recommendations. Intraorganizational Channels. While upward and downward communications are vertical on the chart of command, intraorganizational channels are horizontal. Intraorganizational channels of organization are essential for the smooth operation of any business organization. Most departments depend on one or more departments for their successful operation. The intraorganizational channels must be clear and open in order for one department to cooperate fully with other departments. An example is when the sales department needs a new employee, the personnel department will be notified of the vacancy. The personnel department will in turn locate a new employee; and once a

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Communication Channels in the Organization (continued)		new employee has been hired, the accounting department must be notified so that the necessary information can be obtained for payroll records. Extraorganizational Channels. Lines of communication extend also to various external groups. Among these groups might be communication from all levels of government, customers, suppliers, unions, home of the employees, and the general public. A well-organized company will be extremely alert to communications that come from the extraorganizational channels because the company will be informed of such things as government regulations, customer complaints, union negotiations, and other information which will have a definite effect on the operation of the company. Examples of communication from extraorganizational channels might be a customer complaining about a defect in merchandise purchased from the company or a new law increasing the amount of deduction from employees' wages for FICA purposes. Refer to the Line and Staff Chart B on page O/M-11. Discuss with students the various types of information that might come through the four channels of communication in the school organization described in the illustration. Some examples might be as follows: Downward Channels: The prinicpal addressing the student body on the school's intercommunication system concerning students who won competitive events at a recent FBLA/PBL regional conference. The principal discussing changes in the school's attendance policy with teachers at a faculty meeting. Upward Communication: A teacher sending a student to the dean of students for repeatedly coming to class late. Student presenting a petition to the principal asking that the lunch break be extended by 15 minutes.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Communication Channels in the Organization (continued)		Intraorganizational Channels: Coach sending a memorandum to the credentials secretary requesting the grades of team members so that eligibility can be checked. Business department and mathematics department members meeting to discuss what areas should be taught in a consumer mathematics course. Student council and club representatives meeting to plan homecoming activities. Extraorganizational Channels: Parents calling to report that their son or daughter will be absent today. The state legislature passing a law changing graduation requirements.

TRIP TO THE MOON

DECISION-MAKING EXERCISE

INSTRUCTIONS: You are a member of a space crew originally scheduled to rendezvous with a mother ship on the lighted surface of the moon. Due to mechanical difficulties, however, your ship was forced to land at a spot some 200 miles from the rendezvous point. During re-entry and landing, much of the equipment aboard was damaged and, since survival depends on reaching the mother ship, the most critical items available must be chosen for the 200-mile trip. Below are listed the 15 items left intact and undamaged after landing. Your task is to rank them in order in terms of their importance for your crew in allowing them to reach the rendezvous point. Place the number 1 by the most important item, the number 2 by the second most important, and so on through number 15, the least important.

___ Box of matches
___ Food Concentrate
___ 50 feet of nylon rope
___ Parachute silk
___ Portable heating unit
___ Two .45 calibre pistols
___ One case dehydrated Pet milk
___ Two 100 lb. tanks of oxygen
___ Stellar map (of the moon's constellations)
___ Life raft
___ Magnetic compass
___ 5 gallons of water
___ Signal flares
___ First aid kit containing injection needles
___ Solar-powered FM receiver-transmitter
___

Key		
Little or no use on the moon	15	Box of matches
Daily food supply required	4	Food concentrate
Useful in tying injured together, or help in climbing	6	50 feet of nylon rope
Shelter against sun's rays	8	Parachute silk
Useful only if party landed on dark side of moon	13	Portable heating unit
Self-propulsion devices could be made from them	11	Two .45 caliber pistols
Food, mixed with water for drinking	12	One case dehydrated Pet milk
Fills respiration requirements	1	Two 100 lb. tanks of oxygen
One of principal means of finding direction	3	Stellar map
CO_2 bottles for self-propulsion across chasms, etc.	9	Life raft
Probably no magnetic poles, thus useless	14	Magnetic compass
Replenishes loss by sweating	2	5 gallons water
Distress call when line of sight possible	10	Signal flares
Oral pills or injection medicine valuable	7	First aid kit containing injection needles
Distress signal transmitter possible communication with mother ship	5	Solar-powered FM receiver-transmitter

BUSINESS ORGANIZATION AND MANAGEMENT - CRITERION-REFERENCED TEST - LEVEL II

O/M-II-1 FUNDAMENTALS OF PERSONNEL MANAGEMENT

Directions: Select from Column 1 the term that matches the description in Column 2. Write the letter from Column 1 in the blank provided. There may be more than one correct answer for a question. Only one answer need be given.

COLUMN 1

A. Recruit
B. Select
C. Train
D. Evaluate
E. Wage and Salaries

COLUMN 2

_____1. Advertisement in a newspaper announcing openings in a company.
_____2. Implications of the affirmative action law.
_____3. Reviewing with employee who has been on the job for six months employee progress or lack of progress with the company.
_____4. Surveying similar businesses to determine pay and fringe benefits offered to their employees.
_____5. Employer seeking answer during the interview to the question "Can the applicant do the job?"
_____6. A company representative appearing on a school campus to hire new employees.
_____7. Demonstrating to a new employee how to do a task.
_____8. Discussing with employee ways in which job performance can be improved.
_____9. Allowing a new employee to perform a task without supervision.
_____10. Determining what employee fringe benefits will cost the company

KEY

1. A
2. A or B
3. D
4. E
5. B
6. A
7. C
8. D
9. C
10. E

BUSINESS ORGANIZATION AND MANAGEMENT - CRITERION-REFERENCED TEST - LEVEL II

O/M-II-3 CHANNELS OF COMMUNICATION

Directions: Select from Column 1 the channel of communication that matches the instance described in Column 2. Write the letter from Column 1 in the blank provided.

COLUMN 1

A. Downward Channel
B. Upward Channel
C. Intraorganizational Channel
D. Extraorganizational Channel

COLUMN 2

_____1. The principal of the school announces that because of the large number of students on the honor roll, school will be dismissed at noon next Friday.
_____2. The teacher complains to the principal that a scheduled field trip had to be cancelled because promised transportation was not available.
_____3. The sales department of a company notifies the personnel department that one of the salespersons has quit and a new employee is needed.
_____4. A customer writes a letter to a company reporting a defect in an item purchased from the company.
_____5. The president of a company informs all employees that the Friday after Thanksgiving will be a paid holiday.
_____6. A worker notifies the department supervisor that a machine has broken down.
_____7. The federal government notifies a company that it must pay all employees at least the minimum wage.
_____8. An employee uses the company's suggestion box to voice concern about a personnel policy.
_____9. An employee's wife calls her husband's office and reports he will not be in to work today because he is ill.
_____10. The business education department of a school meets with the math department to discuss subject areas to be taught in a business math course.

KEY
1. A
2. B
3. C
4. D
5. A
6. B
7. D
8. B
9. D
10. C

BUSINESS ORGANIZATION AND MANGEMENT - CRITERION-REFERENCED TEST - LEVEL II

O/M-II-2 DECISION-MAKING PROCESS

Directions: The five steps in the fact-finding method of the decision-making process are listed below. Arrange the steps in their proper order.

A. Analysis of the Problem
B. Best Solution and Defense
C. Identification of the Problem
D. Possible Solutions and Ramifications
E. Facts Relating to the Problem

1.________________

2.________________

3.________________

4.________________

5.________________

KEY

1. C
2. E
3. A
4. D
5. B

COMPETENCY PROFILE

for

BUSINESS ORGANIZATION AND MANAGEMENT - LEVEL II

Student Name ______________________________

Start Date ______________________

Completion Date ______________________

(date/initial)

	QUALIFIED	SCORE	NOT QUALIFIED
O/M-II-1 Fundamentals of Personnel Management			
O/M-II-2 Procedures used in Decision-Making			
O/M-II-3 Formal Channels of Communication			

CERTIFICATE OF COMPETENCY AWARDED ______________________________

Date Initials

CERTIFICATE OF COMPETENCY

this is to certify that

____

has demonstrated competence in the skills
listed on the reverse side of this certificate
in the area of

BUSINESS ORGANIZATION/MANAGEMENT

________________	________________	________________
Completion date	School	Instructor

LEVEL I

___ Characteristics of Business Ownership

___ Advantages and Disadvantages of Types of Business Ownership

___ Descriptions of Management Functions

___ Types of Business Organization Charts

___ Characteristics of Good Business Management

LEVEL II

___ Fundamentals of Personnel Management

___ Procedures used in Decision Making

___ Formal Channels of Communication

COOPERATIVE OFFICE EDUCATION

DESCRIPTION

COE is a program designed to prepare students for entry-level office employment by developing attitudes, abilities, and skills needed in office occupations. Students must enroll in the COE class to receive daily instruction which is coordinated with work experience. Students participating in the COE program receive school credit for released class time. They work an average of 15 hours per week minimum and are paid by their employers at the usual rate of pay for beginning workers.

Individualized instruction which correlates class work with job experiences, career objectives, and student needs is necessary if the school is in fact offering cooperative office education. The teacher-coordinator is the catalytic link between the school and the business community. An advisory committee provides community input and guidance for the program.

FBLA/PBL the Arizona State sanctioned co-curricular student organization is recommended for COE students. Students in the COE program should be well-prepared to compete in the many FBLA/PBL competitive events at the leadership conferences.

Guide to Integrating FBLA/PBL into the Curriculum provides activities to help business educators integrate FBLA/PBL into the classroom. These materials may be purchased from the national office and include innovative ideas for integrating activities in five major areas:

Basic Business
Shorthand
Accounting
Typing
Office Procedures

Future Business Leaders of America/Phi Beta Lambda
P. O. Box 1741-Dulles
Washington, D.C. 20041

Pages

1. Related Classroom Instruction

- Identifying Student Needs for Individualization of Instruction COE-3
- Organizing Classroom Instruction COE-3
- Relating Instruction to Job Needs COE-3
- Methods of Individualizing Instruction COE-3-4
- Student Co-curricular Organization COE-4

Units of Instruction

- Recommended for All Students COE-4
  - Orientation to COE COE-4
  - Telephone Techniques and Meeting the Public COE-4
  - Records Management (Filing) COE-4
  - Using Mail and Shipping Services COE-4
  - Qualities for Job Success COE-4
  - Efficient Time and Task Management COE-5
  - Using Reference Materials COE-5
  - Getting and Keeping a Job COE-5

- Recommended for Individualized Instruction . . . . . COE 5
  - Business Correspondence and Reports COE-5
  - Dictation, Transcription, and Information Processing COE-5
  - Reprographics (Duplicating) COE-5
  - Financial Records Management COE-5
  - Adding Machines COE-6
  - Calculators COE-6
  - Business Math COE-6

2. Calendar Checklist for COE Coordinators

- Preliminary Steps Before Starting a COE Program COE-7
- Guidelines for New COE Program COE-7
- Checklist for New and Continuing Programs COE-7
  - August COE-7
  - September COE-11
  - October, November, and December COE-13
  - January COE-13
  - February, March and Early April COE-13
  - Late April, May, and June COE-15
  - In Your Spare Time COE-18
  - July COE-19

3. End-of-Year Employer Appreciation Event COE-20

4. Index to COE Supplements COE-24

RELATED CLASSROOM INSTRUCTION

The classroom instruction phase of the COE program must bridge the gap between competencies the student has upon entering the program and those competencies the student needs to be effective in an office job. It consists of three major area: (1) formal classroom instruction, (2) supervised on-the-job training, and (3) co-curricular youth group activities.

Identifying Student Needs for Individualized Instruction

A combination of interviews with the student, discussions with previous business teachers, conferences with the student's school counselor, examinations of the student's permanent records in the school office, pretests, and consultations with the student's COE employer should enable the teacher-coordinator to determine each student's individual classroom instructional needs. REFER TO COE pages 3-6.

Organizing Classroom Instruction

Related classroom instruction requires a great deal of organization because of the many areas to be covered in the short amount of class time provided during the school year. Classroom instruction must insure that each student develops those competencies directly related to present employment as well as competencies needed to prepare the student for success in other business occupations after graduation.

In planning the order in which to cover units of instruction in the classroom; first, teach competencies which are most needed in all office jobs. Then teach skills and competencies which are frequently performed or which are essential in many office jobs. Proceed from the simple to the complex in each area covering the essential things first and then expanding to more detailed coverage and "nice to know" things as time permits. The first week of COE classroom instruction should include an orientation to the COE program itself so that all students are aware of the positive attitude so essential to job success, the guidelines they are to follow, the responsibilities they are to assume in class as well as on the job, and the classroom procedures to be followed. REFER TO: COE page 4, ORIENTATION TO COE.

Group processes can be employed for instructional content in areas of common concern to all students. This is especially true for topics covered during the first few weeks of school such as telephone techniques and filing. As the coordinator gains experience, knowledge of the student's needs and those of the business community will assist in determining the order in which to teach the various units of instruction in the COE related class.

Relating Instruction to Job Needs

The coordination of classroom instruction and work experience is most effective when the competency is developed in class prior to or at the time the student needs the information on the job. Group instruction must be flexible enough to be postponed or temporarily interrupted to allow certain class members to proceed immediately with an individualized instructional unit to improve skill or knowledge relating to a job task the employer has indicated is needed. Cooperative Office Education is nonexistent unless classroom instruction is available for developing competencies directly related to a student's current office job as the skills are needed on the job.

Methods of Individualizing Instruction

The teacher-coordinator must prepare procedures, assignment sheets, and step-by-step instructional materials that can be followed by students on an individual basis with a minimum of instructor assistance since the teacher-coordinator cannot effectively instruct students in the various areas needed by different students at the same time.

Programmed instruction, tutorial aids, filmstrips, cassette players, job assignment sheets, small group discussions, guest speakers, field trips, bulletin boards, library reference materials, problem-solving and creative thinking activities, and role playing. Other methods are: teacher demonstrations, vendor demonstrations, assistance from other class members who have previously completed the unit, and one-to-one student-teacher interaction. Provision must be made for an individual student to complete a unit which was done as a group activity by the rest of the class while that student was working on an individual job-needed competency.

Student Co-curricular Organization

Co-curricular organization activities should be integrated into the classroom to provide experiences, opportunities, and motivation for students to develop attitudes and knowledges about FBLA/PBL professional activities, social behavior, leadership skills, and human relations that cannot be learned in a classroom or office situation. For further information on FBLA/PBL activities, REFER TO: FBLA/PBL section of this curriculum guide. REFER TO: FBLA/PBL page 8 which provides suggestions for integrating FBLA/PBL Professional Activities into the classroom.

UNITS OF INSTRUCTION

The following is a guide of suggested topics that should be included in the COE classroom instruction. The order in which the topics will be covered will vary depending upon the needs of the students and the business community.

RECOMMENDED FOR ALL STUDENTS

Orientation to COE

REFER TO: COE pages 54-58.

This unit should be covered in group instruction during the first few days of class. A comprehensive orientation is essential to establish student understanding of the program and develop the framework for a smoothly run program throughout the year. The orientation should help eliminate problems resulting from misunderstandings which might otherwise occur.

Telephone Techniques and Meeting the Public

REFER TO: TELEPHONE TECHNIQUES and HUMAN RELATIONS SKILLS

Records Management (Filing)

REFER TO: RECORDS MANAGEMENT

Using Mail and Shipping Services

REFER TO: MAIL PROCESSING

Qualities for Job Success

REFER TO: HUMAN RELATIONS SKILLS

RECOMMENDED FOR ALL STUDENTS (Continued)

Efficient Time and Task Management

REFER TO: HUMAN RELATIONS SKILLS, page HR-6.

Using Reference Materials

REFER TO: REFERENCE SOURCES

Getting and Keeping a Job

REFER TO: APPLYING FOR A JOB and HUMAN RELATIONS SKILLS
It is suggested that interviewing techniques and procedures for preparing job applications and resumes must be covered with the students before school starts and before students are placed in COE jobs. This is usually done in the spring at a meeting with the COE applicants for the coming school year. The unit is then reserved for class discussion as the last unit covered by the entire class in May to prepare them for job seeking after graduation.

RECOMMENDED FOR INDIVIDUALIZED INSTRUCTION

Business Correspondence and Reports

REFER TO: COMMUNICATION ARTS

Dictation, Transcription, and Information Processing

For students needing shorthand practice, REFER TO: SHORTHAND (Levels II, III, and IV). For students needing practice in transcription, REFER TO: MACHINE DICTATION/TRANSCRIPTION. For familiarity of terminology, for all students and for specialized training as needed by individual students, REFER TO: WORD/INFORMATION PROCESSING and DATA/INFORMATION PROCESSING. All students should be familiar with D/IP and W/IP terminology, REFER TO: D/IP page 3.

Reprographics (Duplicating)

REFER TO: REPROGRAPHICS/DUPLICATING

Financial Records Management

Banking - ACCOUNTING, p. A-8, RECORDKEEPING, p. RK-2, 4, 5.
Payroll - ACCOUNTING, p. A-12, RECORDKEEPING, p. RK-6.
Financial Reports - ACCOUNTING, p. A-4.
Miscellaneous Financial Records - Petty Cash, ACCOUNTING, p. A-13, RECORDKEEPING, p. RK-8, Inventory Records, RECORDKEEPING, p. RK-7-8.
REFER TO: ACCOUNTING and RECORDKEEPING.

RECOMMENDED FOR INDIVIDUALIZED INSTRUCTION (Continued)

Adding Machines

REFER TO: BUSINESS MATH/MACHINES.

Calculators

REFER TO: BUSINESS MATH/MACHINES.

Business Math

REFER TO: BUSINESS MATH/MACHINES.

HINT: Some COE teachers use some type of model office or simulation project during part or all of the second semester to reinforce and integrate all units taught.

CALENDAR CHECKLIST FOR COE COORDINATORS

THIS PAGE IS DESIGNED ESPECIALLY FOR NEW PROGRAMS:
Schools considering a COE program, must take the following preliminary steps:

1. Conduct a community survey to
   Determine types of businesses and the learning experiences they might provide COE students.
   Determine whether local businesses will support a COE program.
   Learn names of potential training stations.
   Determine starting salaries for entry-level office occupations in the community.
      REFER TO: COE pages 50, 67, Sample Business Community Survey and Sample Letter to Enclose with Business Community Survey
2. Conduct a school survey to
   Determine student interest in COE.
   Acquaint the students with the COE program.
   Identify any needed courses or curriculum changes needed.
      REFER TO: COE page 70, Sample Student Interest Survey.
3. Submit proposal for funding

AUGUST

Become familiar with your district boundaries and other districts and their programs.

Visit businesses to
- Determine the kinds of machines and equipment businesses use.
- Determine what kinds of job entrance tests are used.
- Determine the educational training required for entry-level office occupations.

Publicize the progress of the new program and the basic mechanics of operation to
- Board of Education.
- Administration.
- Faculty.
- Students.
- Counselors.
- News Media--school and community.
- Parents.
- Youth group publications.
- State Department publications.
- Businessmen.

REFER TO: COE page 60, Suggested Recruitment and Publicity Activities

THE REMAINDER OF THIS CALENDAR CHECKLIST IS DESIGNED FOR NEW AND CONTINUING PROGRAMS

AUGUST

Coordination

Keep a daily record of telephone calls, activities, coordination calls, and mileage so information will be easily transferable to required reports and future records.

Meet with the appropriate adminstrator to preview the year.

AUGUST (continued)

Acquaint yourself with and/or review district policies that affect student placement and work experience.

Review present enrollment:
  Contact each student accepted to review career interest and to determine availability for work.
  Fill any vacancies left by students not returning to school and/or the program.
    REFER TO: COE page 33, Checklist of Recruitment, Acceptance and Placement Activities

Set up student file folders. REFER TO: COE page 66, Sample Student Profile Sheets and COE page 30, Checklist of Students Permanent File

Check student transcript to be sure all graduation requirements will have been met by the end of the year.

Adjust student schedules (in cooperation with counselor and/or registrar) to fit work schedule.

Make arrangements for meeting with students and parents for orientation to COE if you did not do this in the spring. This may require home visitations. REFER TO: COE page 54, Agenda for COE Parent Orientation and COE page 55, Policies.

Contact each former employer of COE students to determine continued participation.

Locate new training stations as needed and inform new employers and supervisors of responsibilities. REFER TO: COE page 48, Checklist for Evaluating Student Training Stations and COE pages 31, Coordination Visits.

Read classified employment ads to determine availability of jobs in community.

Contact DES Job Services and other community job sources for job referrals.

Send students for interviews as employers make commitments. REFER TO: COE page 59, Sample Employer Contact Card. REFER TO: COE page 44, Sample Student Introduction Card.

Share openings with other coordinators. (This is done via the Clearinghouse in the Phoenix Area).
HINT: Only one coordinator chould call on large businesses to handle the interviewing, hiring and other details of employment. A considerable amount of time is required in May and August to perform this duty.

AUGUST (continued)

Arrange for and conduct presentations to civic organizations.

Attend August Symposium sponsored by State Department of Education

Attend meetings with other coordinators in your school to solve common problems.

Attend meetings with other coordinators in your district and other districts with whom you may do joint placements.

Report to director of vocational programs (state level and district level) on progress, success, and problems of the program.

Write an article on COE for the first edition of the school newspaper and/or parent newsletter.

If not done in the spring
  Plan public relations program for coming year—reserve important dates and facilites.
  Contact individuals in charge of marquee to promote special events.
  Obtain copies of labor and minimum wage laws. REFER TO: COE page 71, Labor and Minimum Wage Laws.

Classroom:

Prepare a calendar of classroom activities—make broad lesson plans for the year and detailed plans for the opening week of school. REFER TO: COE pages 3-6, Related Classroom Instruction.

Plan dates and contact guest speakers for the year. Locate former students to be guest speakers when appropriate.

Check on new equipment and familiarize yourself with it.

Organize room and set up machines and special equipment for opening of school.

Check to be sure supplies ordered in the spring have arrived. Store in proper place. Order supplies that cannot be stored in the summer.

Check to be sure textbooks ordered in the spring have arrived.

Plan bulletin boards for the year. Plan a special one for the opening of school.

Advisory Committee:

Organize advisory committee to assist in the development of the COE program by
  Selecting members and scheduling meeting dates.
    REFER TO: COE pages 26, The Advisory Committee

AUGUST (continued)

Student Organization:

Prepare a calendar of probable club activities. Include professional activites, civic activities, fund-raising activities, community service projects, social experiences, conferences in which your group will participate, and reservation of important dates and facilities.
REFER TO: FBLA/PBL, p. 5-10, 13.

SEPTEMBER

Coordination:

Complete placement of all students, if possible. REFER TO: COE page 33, Checklist of Student Recruitment, Acceptance, and Placement Activities.

Complete adjustment of student schedules to fit work schedule, if needed.

Conduct orientation for new students or any who missed the spring orientation. REFER TO: COE pages 54, Orientation to COE.

Conduct parent orientation if this was not done in the spring--or have special orientation for any parents who missed the spring orientation. This may require a home visit by the coordinator. REFER TO: COE page 54, Agenda for COE Parents Orientation and COE page 55, Policies.

Make sure all students, parents, and employers have signed training agreements. This may require a visit to the home or to the business of the employer. REFER TO: COE page 72, Sample Training Agreement

Begin visitation of training stations to work out training plan for each student with each employer. REFER TO: COE page 73, Basic Requirement for Training Plan and Sample Training Plan. REFER TO: COE page 31, Coordination Visits.

Notify all teachers at the school who the COE students are and what you expect of the students (absences, procedures for make-up work, behavior, poor class progress).

Classroom:

Prepare lesson plans and begin classroom instruction. REFER TO: COE pages 3-6, RELATED CLASSROOM INSTRUCTION.

Advisory Committee:

Prepare agenda and conduct first advisory committee meeting.

Send minutes of the meeting to all committee members.
REFER TO: COE page 26, The Advisory Committee

SEPTEMBER (continued)

Student Organization:

Elect and install officers.
Assist student officers with planning activities.

Decide regular meeting times.

Train officers (especially president and vice-president) in basic parliamentary procedures needed to conduct orderly meetings. HINT: A guide, Integrating FBLA/PBL into the Classroom, is available from the Arizona Department of Education.

Provide guidance as students plan professional, civic, community, fund raising, and other activites. Student treasurer and sponsor are responsible for keeping and verifying all records with bookstore.

Check school calendar to be sure all important dates for your group have been included.

Make group decision on attendance at FBLA/PBL Western Region Leadership Conference. If group decides to attend, complete appropriate paperwork.

Attend state FBLA/PBL advisor's meeting.

Make arrangements for transportation of Chapter Officers to the FBLA/PBL Chapter Officer's Training Conference. REFER TO: FBLA/PBL, p. 6-10.

OCTOBER-NOVEMBER-DECEMBER

Coordination:

Continue visitation of training stations to complete training plan with each employer. REFER TO: COE page 73, Training Plan.

Conduct periodic evaluation of training stations. REFER TO: COE page 49, Checklist for Evaluating Student Training Stations by Teacher.

Evaluate on-the-job progress by conferring with employer and convert, evaluation information to grade for first grading period. Confer with employer and/or student to resolve any problems encountered on the job. If problems cannot be resolved, there might be justification for a job change. This, of course, would only be done after in-depth conferences with student, parent, and employer. REFER TO: COE page 39, Sample Progress Reports, COE page 48, Evaluation of Training Station by Student, and COE page 49, Checklist for Evaluating Training Stations

Invite an administrator and/or counselor on a coordination call with you.

OCTOBER-NOVEMBER-DECEMBER (continued)

Keep school administration informed of progress including outstanding accomplishments.

Plan and conduct a parents' night program. This may be held in conjunction with an all-school open house for parents.

Meet with other business teachers to plan a program for studies for business education and develop materials that will assist students, parents, and counselors in understanding your program.

Maintain daily log of coordination activities, training station visits, and telephone calls. These prove to be extremely useful in completing mileage and other administrative reports.

Classroom:

Individualize instruction where needed as indicated on Training Plan, Student Progress Report, and Student Profile Sheet.

Conduct individual conferences with students to keep informed about their feelings concerning the class and the job, to solve problems, and to offer encouragement. This is also a good time to help students become aware of and correct undesirable personal habits. Progress reports to parents may be needed at this time.

Assess student classroom progress and convert to grade for first grading period. Schedule parent conference if needed. REFER TO: COE page 63, Weekly Work Report, and page 47, Student Self Evaluation.

This is also a good time to check on student attendance and grades in other classes and enlist the aid of other teachers to improve attendance and grades if necessary.

Plan and prepare bulletin boards appropriate for the holidays (Halloween, Thanksgiving, and Christmas). This may be assigned to students. HINT: Commercially prepared bulletin boards are available.

Review present equipment, furniture, and machines in order to be able to budget for new purchases and trade-ins when requested to do so by administration.

Contact vendors and suppliers of equipment, furniture, and machines to see newest models demonstrated.

Advisory Committee:

Follow through on recommendations from first advisory committee meeting. Plan and conduct additional meetings as needed. REFER TO: COE page 26, The Advisory Committee.

OCTOBER-NOVEMBER-DECEMBER (continued)

Student Organization:

Provide guidance as students conduct financial and other activities.

Supervise, conduct periodic audits of all organization money and requisitions.

Attend and supervise students who attend FBLA/PBL Chapter Officer's Training Conference.

Attend and supervise students who attend Western Region Leadership Conference. (Optional)

Plan and conduct holiday activities (social, charity, and community service projects).

Prepare appropriate publicity of activities for school and local media.

Prepare registration for regional FBLA/PBL conference (held in February in different areas of the state).

JANUARY (End of Semester)

Coordination:

Evaluate on-the-job progress after conferring with employer and convert evaluation information to first semester grade. REFER TO: COE page 39, Sample Student Progress Reports.

Advise and prepare exit for midyear graduates.
HINT: Midyear graduates are to be discouraged because this disrupts the training and does not allow sufficient time for student career development.

Assist students with any needed second-semester schedule adjustments.

Assist students who wish to apply for scholarships and grants.

Plan a follow-up study of previous graduates. REFER TO: COE page 68, Follow-up Questionnaire for COE Programs.

Update promotional brochures, recruiting materials, course descriptions, programs of study, and schedule of classes.

Begin preparation for end-of-year appreciation event. REFER TO: COE page 20, End of Year Appreciation Event

Classroom:

Prepare necessary end-of-semester grade reports.

Conduct individual conferences with each student to discuss grades and job progress. Schedule and conduct parent conferences if needed.

JANUARY (continued)

Prepare second semester lesson plans. REFER TO: COE pages 3-6, Related Classroom Instruction.

Plan second semester bulletin boards and displays.

Contact book representatives for examination copies of newest materials, practice sets, and textbooks available.

Student Organization:

Plan FBLA/PBL Week activities (second week of February).

Prepare photos of student organization members and prepare copy to be used in the school yearbook.

Assist counselors with presentations to grade school for preregistration of incoming freshmen.

FEBRUARY-MARCH-EARLY APRIL

Coordination:

Activites for recruiting next year's COE students (Juniors). REFER TO: COE page 33, Checklist for Recruitment, Acceptance, and Placement Activities

Choose senior students to assist with recruiting

Plan schedule of recruiting activities. REFER TO: COE page 60, Suggested Recruitment and Publicity Activities.

Disseminate application blanks and specific COE information to juniors. REFER TO: COE page 65, Application for Admittance

Interview and counsel prospective COE students. REFER TO: COE page 44, COE Teacher's Interview Evaluation Event.

Send faculty recommendation forms to student's present teachers. REFER TO: COE page 43, Sample Faculty Evaluation Form.

Collect information about students, study applications, teacher recommendations, interview notes, and student cumulative records.

Provide parents with information regarding program for which their child has applied. REFER TO: COE page 51, Sample Parent Letter.

FEBRUARY-MARCH-EARLY APRIL (continued)

Visit training stations to
- Solve problems as they arise.
- Work out details for completion of training plan.
- Determine on-the-job progress and convert to grade for report cards.
- Evaluate the effectiveness of the training station.
- REFER TO: COE page 31, Coordination Visits.

Continue detailed preparation for end-of-year appreciation event. REFER TO: COE page 20, End-of-Year Appreciation Event.

Begin selection process for awards and scholarships.

Plan special activities for National Secretaries' Week (April).

Plan and/or attend a Career Day.

Write an article for school newspaper summarizing current and future COE activities. Publicize FBLA/PBL competition award winners in local newspaper and radio.

Classroom:

Classroom instruction will become more individualized. Those teachers who use model office simulations will be using them at this time.

Prepare mid-term grade reports (conduct individual conferences as needed; contact parents if necessary).

Plan and prepare appropriate bulletin boards for recruitment, Valentine's Day, St. Patrick's Day, Easter, and Spring.

Serve on textbook selection committees to review and update textbooks, practice sets, and other supplementary materials.

Finalize budgets for furniture, machines, equipment, supplies, classroom remodeling, rewiring, maintenance, etc.

Advisory Committee:

Implement ideas of advisory committee; plan and conduct meetings as needed. REFER TO: COE page 26, The Advisory Committee

Student Organization:

Attend and supervise students who attend the FBLA/PBL Regional Conference.

Conduct FBLA/PBL Week activities (second week of February).

FEBRUARY-MARCH-EARLY APRIL (continued)

Screen to select best contestants for State FBLA/PBL Leadership Conference

Register for State FBLA/PBL Leadership Conference.

Attend and supervise students who attend State FBLA/PBL Leadership Conference. Everyone in the organization may attend; students interested in joining but not currently members as well as business teachers not currently advisors may also attend. Workshops are offered for those who are not in competitive events.

Conduct detailed audit of organization funds to determine amount available for use by committees in charge of end-of-year appreciation event. Organize additional fund raising if needed. REFER TO: COE page 20, End-of-Year Appreciation Event.

LATE APRIL-MAY-JUNE (End of Year)

Coordination:

Complete all final arrangements for end-of-year employer appreciation event. REFER TO: COE page 20, End-of-Year Appreciation Event.

Make final selection of those to receive awards and/or scholarships. Award certificates are available to ABEA members for distribution to students, businessmen, administrators, etc. and may be obtained at any ABEA conference or by writing the ABEA President.

Participate in all-school award's program.

Confer with every employer to:
Determine final evaluation of on-the-job training and convert evaluation information to final grade.
Complete training plan to be sure it is accurate and up to date.
Minimize problems involved in transition of new COE students and/or placement of present COE students to continue part-time or become a full-time employee.

Assist employers (present, past, and new) with summer employment needs.

Send thank you letters to all employers. REFER TO: COE page 53, End-of-Year Thank You Letter to Employer.

Provide guidance to each graduating student pertaining to college plans, continuation of employment at present training station, or placement in a new job.

Make final selection of juniors to be in next year's program. REFER TO: COE page 34, Suggested Guidelines for Selecting COE students.

Communicate decisions to students regarding acceptance in COE. REFER TO: COE page 52, Student Acceptance Letter.

LATE APRIL-MAY-JUNE (End of Year) (continued)

Talk personally with each student who applied but who was not selected for COE.

Notify parents of those students selected. REFER TO: COE page 51, Sample Parent Letter (Revise as needed).

Plan and conduct orientation for juniors selected for next year's program to make them aware of responsibilities involved and to prepare them for impending job interviews. REFER TO: COE page 54, Orientation to COE.

Assist students chosen for COE with preregistration and scheduling of next year's classes.

Plan and conduct orientation for parents of juniors selected for next year's program. This may require a home visit. REFER TO: COE page 54, Agenda for COE Parents Orientation.

Set up student file folders for new COE students. REFER TO: COE page 66, Sample Student Profile Sheet and COE page 30, Checklist of Contents of Student's Permanent Record.

Begin contacting employers and initiating placement activities. REFER TO: AUGUST CALENDAR, COE page 7.

Arrange job interviews for new COE students

Complete Training Agreement and begin preparation of training plans for new students already hired.

Complete follow-up study of previous graduates. Summarize to include in End-of-Year Report. REFER TO: COE page 68, 72, Follow-up Questionnaire and End-of-Year Report.

Help organize and attend graduation ceremonies.

Prepare vocational education reports as required by the State Department of Education and local school.

Plan special events for coming year--reserve important dates and facilities as needed.

Assist new students in organizing a fund-raising drive.

Attend meetings with other coordinators in your school, in your district, and other districts with whom you do joint placements.

Prepare end-of-year report to: principal, department chairperson, district administrator, employers, faculty, students, and advisory committee. REFER TO: COE page 62 End-of-Year Report.

LATE APRIL-MAY-JUNE (End of Year) (continued)

Evaluate the effectiveness of the COE program by requesting
 Students to evaluate program, class, teacher, training station, and end-of-year appreciation event.
 Parents to evaluate program.
 Employers to evaluate students and program.
 Self-evaluation by student, by teacher, and by employer. REFER TO: COE pages 35, 46, Evaluations by Students, Parents, Employers, and Self-Evaluation by Students.

If you are assigned a large business, allow time for coordination. REFER TO: AUGUST CALENDAR HINT, COE page 7.

Classroom:

Review individual training plan for each student to be sure it is accurate and complete; then individualize instruction to fill in all gaps in minimum competencies.

Invite employers, parents, administrators, legislators, other students, and other teachers to observe special classroom activities (model office).

Prepare final grade reports.

Plan and prepare end-of-year bulletin boards (YOU NEVER GRADUATE FROM SUCCESS).

Finalize schedule of classes for next year.

Have present students prepare a self-addressed envelope to assist in follow-up.

Order textbooks, practice sets, tests, and other supplementary materials for next year.

Order supplies for next year.

Order new machines and equipment as approved.

Inventory and store equipment.

Prepare machines for summer maintenance and repair.

Advisory Committee:

Plan and conduct end-of-year advisory committee meeting to evaluate its success and activities, and replace outgoing members if needed.

Send Letter of Appreciation.

LATE APRIL-MAY-JUNE (End of Year) (continued)

Student Organization:

Prepare for attendance at National FBLA/PBL Leadership Conference.

Participate in National Secretaries' Week activities (April).

Complete arrangements for and attend end-of-year employer appreciation event. REFER TO: COE page 20, End-of-Year Appreciation Event.

Plan end-of-year social.

Prepare budgets for next year's organization; do final audit of this year's funds; check accuracy and verify the entire year's transactions with the bookstore or activity funds accounts manager before treasurer graduates.

IN YOUR SPARE TIME

Read the professional literature and trade journals to keep informed on developments at local, state, and national levels.

Make sure the room has up-to-date supplementary materials and periodicals avaliable for use by students when required assignments are completed.

Work with librarian to requisition reference books and supplementary materials.

Write articles for professional journals.

Collect occupational information and disseminate to counselors and administrators.

Participate in research to help resolve current issues in business education.

Develop and revise curriculum as needed.

Experiment with and evaluate newest teaching techniques and methods.

Review and improve teaching units for in-school instruction.

Devise time-saving techniques to help accomplish as much as possible in the least amount of time.

Call photography class to take photos of students in action.

Prepare exhibits of student work for display.

Visit other schools and observe their programs.

Participate in local church and community functions as a leader.

Attend other school activites (such as sports events, drama, and musical programs) to indicate support.

IN YOUR SPARE TIME (continued)

Maintain active membership in local, state, and national education and business education associations.

Serve on committees as requested at local and state level.

Work in businesses during the summer to keep your skills and business technology up-to-date.

Attend school to keep current in your discipline.

Attend in-service workshops for professional development.

When requested, give talks to classes at other schools and colleges.

Set an example in character, dress, ethical standards, and work habits which students may follow.

Maintain continuous positive communication with students, other faculty members, parents, community, employers, advisory committee, local school and district administrators, State Department personnel, counselors, and other coordinators.

JULY

Attend FBLA/PBL National Leadership Conference (Optional)

HINT: Rest—you are going to need it!

END-OF-YEAR APPRECIATION EVENT

Suggested Committees	Responsibilities
Steering Committee (usually composed of officers)	Appoint Committees and make sure all other committees function properly.
Theme Committee	Decide on the theme and how to incorporate it into all other preparations for the event.
Facilities and Menu	Select place. Determine date. Sign contract with restaurant or caterer; make arrangements with treasurer to do necessary paperwork for deposit, if needed Visit with proper person to determine selection of menu room and table arrangements color of tablecloths and napkins centerpieces available speaker system and podium piano, if needed extra tables any special punch printed napkins or matches special dessert confirm head count and notify proper person one week before event. Make arrangements with treasurer to have check ready the day of the event for payment of meal, or make arrangements for billing and later payment.
Invitations Committee	Design invitation. Make printing arrangements. Make arrangements with treasurer for payment of printing. Prepare list of invited guests, be sure to verify proper spellings and titles. HINT: The employers are invited; others who might be invited include: Superintendent and other district administrators Principal and other local administrators Board of Education Advisory committee members Department chairperson and special teachers Parents Other people who have been especially helpful during the year Spouses of invited guests should be invited to an evening banquet.

END-OF-YEAR APPRECIATION EVENT (continued)

Invitations Committee (continued)

- Handle all RSVP's
- Prepare final list of all people who will be in attendance (to be used by other committees)

Program Committee

- Decide what to include on the program
  - Speaker
  - Order of Program
  - Pledge of Allegiance led by______
  - Invocation given by___________
  - Introduction of employers and other guests
  - Introduction of officers
  - Presentation of awards
  - Presentation of certificates
  - Presentation of scholarships
  - Entertainment, if desired
- Design the printed program.
  - HINT: Items that might be included:
    - Place, date and theme on cover
    - Menu
    - List of COE students, places of employment, name of supervisor
    - List of officers and students receiving awards
    - List of special guests
    - Advisory committee, Board of Education, administrators
    - Special poem or saying in keeping with theme and/or FBLA/PBL Pledge or Creed
    - List of people who deserve recognition and thanks
- Make arrangements for having program printed; make arrangements with treasurer for payment
- Make sure programs are taken to the place of the event.

Name Tags, Place Cards, and Seating Arrangements

- Purchase or have printed name tags and place cards; make arrangements for payment.
- Using list prepared by Invitations Committee, prepare name tags, place cards, head table seating, and general seating chart.
- Make sure name tags and place cards are taken to place of event.
- Determine appropriate seating arrangements and notify all COE students to eliminate awkward moments.

END-OF-YEAR APPRECIATION EVENT (continued)

Decorations	Decide on decorations appropriate for place and theme Purchase or make decorations; make arrangements with treasurer for payment Arrange for time to decorate selected facility Pick up and arrange all decorations, banners, etc. the day of the event (or make arrangements for delivery)
Certificates and Awards Committee	Select certificates or have them printed; make arrangements for payment by treasurer. HINT: Certificates are available from the State Department of Education; Contact State Supervisor of Business Education. Certificates are also available to ABEA members at any ABEA conference or write to ABEA President. Select frames or ribbons; make arrangements for payment by treasurer. Have names put on certificates; insert in frames; make sure they are in appropriate order and are at the event. Decide on appropriate awards for special people including employers. Purchase awards; have them engraved; make arrangements with treasurer for payment; make sure awards are at the event
Publicity	Prepare news releases. HINT: Send to: School newspaper, local newspaper, district newsletter, parent newsletter, radio stations, and TV stations. Call to remind media prior to event, day or week of event, and after event
Cleanup	Make sure facilities are left in perfect order after event. Return all borrowed items.
Thank You	Send thank you letters or notes to every person who was helpful in planning and conducting the appreciation event.

HINT: Week before event: discuss school rules about smoking, alcholic beverages, table manners, appropriate dress and behavior, and proper introductions. This should be done in classroom instruction and/or organization meeting.

SAMPLE SCRIPT FOR END-OF-YEAR APPRECIATION EVENT
(To Be Used By Coordinator and/or Organization President)

On behalf of our school, or institution, I am very happy to welcome you to our event. Several of you have been with us ever since we began holding these events; and I think you can see, as I can, the growth in our program as evidenced by the increase in numbers.

We are particularly pleased today to have some very special guests with us. On my right is ______ ________ and on my left is _______ _________ from the Arizona State Department of Education. I want all of you to know how very helpful these people have been in assisting us with the cooperative program at our school or institution.

________ _______ and ________ __________, it always means a great deal to all of us to have you here with us. I know I speak for all the co-op coordinators in expressing our appreciation to you too for the constant encouragement you give us in keeping this program running smoothly.

I would also like to recognize our advisory committee members. You people spend many long hours working to promote our program, and several of you have worked actively to help us with the cooperative part of our programs. We appreciate your efforts very much.

Today, I would like to thank ______ ________ and the committee for all the effort expended in getting this event organized, with special thanks to ________ ________ for bringing it all together.

Most of all, to all of you employers, thank you very much for working with our students. The program simply would not be possible without your cooperation. The educational experience we offer means so much more to our students when they can compare what they are being taught with what the real working world is like.

We have talked about cooperative education as a means of "bridging the gap" between education and reality until the expression has become a little trite, but that is exactly what happens. One of the real benefits we get, as teachers, is the opportunity to see first hand whether we are teaching what needs to be taught and whether we are using the right equipment. When we have students in your businesses, we are able to see whether we are training them realistically; this insight is tremendously helpful to us.

Thank you all so much for coming, and do enjoy the event.

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AGENDA
(For Initial Meeting)

1. Temporary Chairperson . . . . Teacher-Coordinator
2. Welcome . . . . School Official
3. Why an Advisory Committee? . . . . Teacher-Coordinator
4. Functions and Responsibilities of Advisory Committee
5. Introduction and General Comments by Members
6. Organization of Advisory Committee
    a. Election of Officers (Chairperson and Secretary)
    b. Operating Procedure for Committee
    c. Program of Work
    d. Standing Committees:
        - °Training Stations
        - °Student Relations
        - °Public Relations
        - °Training Agreement - Training Plan
        - °Other
7. Set Date of Next Meeting

AGENDA
(For Regular Meetings)

1. Call to Order . . . . Chairperson
2. Progress Report . . . . Teacher-Coordinator
3. Committee Reports
4. Next Meeting Date*
5. Assignments for Information and Help Needed at Next Meeting:

    Suggested Agenda Items:

    °List of New Training Stations

    °Sample Training Agreement and Training Plan

    °Review of Instructional Units

    °Committee Member to Assist in Development of Youth Organization

*Teacher-Coordinator and Chairperson should provide suggested dates for next meeting. (The agenda for the last meeting of the year should include appointment of a committee chairperson for the next year.)

THE ADVISORY COMMITTEE
General Information

Advisory Committees are now mandated by law as a necessary part of the COE program.

The Arizona State Advisory Council on Vocational Education has prepared a handbook entitled ADVISE FOR ACTION which explains in detail what advisory councils are, their roles, and why they are important. It also includes sample letters and suggested agendas.

This handbook is available to office education teachers in the state, and coordinators will find it useful. For your copy write to:

Dr. Richard Froese
SACVE
Box 6694
1801 West Adams
Phoenix, AZ 85007

(Invitation to Advisory Committee Member)

(Institution Letterhead)

Date

Ms. Constance J. Hill
Merrill, Incorporated
222 South Main Street
Glendale, AZ 85301

Dear Ms. Hill:

(Name of Educational Institution) is organizing a Vocational Advisory Committee to assist with its Coopertive Office Education Program. This program of instruction involves on-the-job training and related classroom instruction needed for employment in today's labor market.

An advisory committee is needed to assist us in preparing students to make the transition from the classroom to the world of work. Also, we need advice as to how this program can best provide a service to the community and the employer. The advisory committee will be composed of local business people and persons interested in providing our students with realistic and practical training.

Your background, experience, and knowledge qualifies you to serve as a member of this committee. We sincerely hope you can serve in this capacity. We anticipate having approximately ___ meetings. __________, Teacher-Coordinator for ________ school, will call on you soon to discuss this further with you.

Sincerely,

George L. Martin, Administrator

CHECKLIST OF CONTENTS OF STUDENT'S PERMANENT FILE

(Keep for five years after student graduates)

1. Student application (signed by student and parent)
2. Student resume
3. Interview evaluation form
4. Faculty recommendation forms
5. Copy of student pretests
6. Grading, credit, and absenteeism policies (signed by student and parent)
7. Copy of student transcript

*8. Student profile sheet (includes hours worked report)

9. Copy of training agreement (signed by student, parent, employer and coordinator)

*10. Copy of student training plan

11. Employer's student progress report
12. Follow-up report (will be sent one or more years after graduation)

*Be sure these forms are accurate and complete just before student graduates. If the student's profile sheet is kept on the inside front cover of the file folder and the student's training plan is kept on top of the other papers in the folder, the coordinator will have all necessary information readily available if references are requested after graduation.

HINT: It is suggested that COE Student's Weekly Activity Reports be kept in a separate file folder. The total hours worked each week should be entered on the student's profile sheet as part of the student's permanent file. The folder of weekly activity reports can then be discarded at the beginning of the following school year.

COORDINATION VISITS

Released time during the school day is provided for the coordinator to visit the training stations, to have conferences with employers, to make appropriate community contacts, etc. The coordinator determines how often to visit, taking care to avoid having the employer feel that the coordinator is "checking" on the business. The following tips may make the visit go more smoothly:

Make an appointment; arrive early or on time; explain in advance the purpose of the visit.

Be businesslike and professional during the visit.

Keep a written summary of each call; record mileage; have a student conference after the call.

Be reasonable in the amount of the employer's time used.

Follow through on anything you tell employer you will do.

THINGS TO DO WHEN MAKING COORDINATION CONTACTS:

Introduce program to employers when placing students on job.

Explain training responsibilities to employers.

Complete training agreements and plans.

Become familiar with the tasks being performed by the student, and observe the student at work.

Discuss with the training supervisor the type of tasks the student performs, and encourage the expansion to new tasks when the student is ready to assume new responsibilities.

Relate job training to classroom instruction.

Make sure the student is not being exploited and that the environment continues to be in the best interest of the student. This may require adjustment of wages, hours, or working conditions.

Follow up on student absences from school.

Work with the employer if a problem arises in which help is requested by the student or the employer:
Examples:

> Student may not like the job or may lose interest in it in the early stages because of the routine tasks performed. Student may become disenchanted and lose interest not only in the job but in school.
>
> The employer may not be providing the student with the training that was indicated when the training plan was made.

THINGS TO DO WHEN MAKING COORDINATING CONTACTS (continued)

> The employer may be hesitant to sign a written agreement or to provide a written evaluation of the student.
>
> The employer may be reluctant to reprimand or correct the student and may expect the coordinator to handle the matter.
>
> The employer may be too busy to see the coordinator and several attempts may have to be made to make a definite appointment.

Determine student progress and secure written and oral evaluations of the student's performance.

Keep employer aware that the program involves the school and is basically an educational program in which the employer is assisting with the education of a student.

Determine the possibility of additional or new training stations.

Obtain instructional materials that can be used in the related class.

Commend training sponsor for training given students.

Meet other employees who work with students.

Recruit membership of advisory committee and work out plans for meetings and agendas.

Secure speakers for special class topics.

Learn of opportunities for full-time employment after graduation.

Improve public relations between school and business community.

CHECKLIST OF STUDENT RECRUITMENT, ACCEPTANCE, AND PLACEMENT ACTIVITIES

NAME OF STUDENT	TELEPHONE NUMBER	CAREER INTEREST	PLANS AFTER GRADUATION	Interested in summer employment? (if yes, dates available & kind of job	Application received	Application signed by parent & student	Student resume received	Student interviewed by coordinator	Transportation (indicate car, bus, etc.)	Student pretested	Faculty evaluation forms sent	Faculty evaluation forms received	Student file opened	Student Profile Sheet started	Copy of student transcript obtained	Transcript checked for GPA, rank, credits, absences, & required classes (Recorded on Student Profile)	Student acceptance letter sent	Parent letter sent	Student meeting (Did student attend?)	Parent meeting (Did parent attend?)	Policies forms (grading, absenteeism) signed by student and parent	Interviews arranged	Student introduction card prepared	Evaluation of interview received	Student Hired by (Employer's Name)	Training Agreement prepared	Trng. Agmt. signed by parent & student	T.A. signed by employer & coordinator	Student's Training Plan prepared	Training Plan reviewed with student	Training Plan reviewed with employer	Training Plan updated end of 1st sem.	Training Plan updated before grad.	Student Profile Sheet updated (May)

COE-33

SUGGESTED GUIDELINES FOR SELECTING COE STUDENTS

Student Should:

_____ Have stated a career interest in an office occupation

_____ Be responsible for own transportation to and from training station

_____ Be 16 years of age or older

_____ Have parental or guardian consent to work

_____ Have adequate skills and meet the prerequisites established for the specific program

_____ Be willing to accept responsibility and follow instructions

_____ Have the ability to work well with others

_____ Have a record of being dependable including being on time

_____ Have an acceptable attendance record (As attendance on the job is essential, the student must be able to explain his past absences from school and should be made aware that excessive absences from the job usually result in dismissal.)

_____ Have an acceptable scholastic record (The coordinator should try to determine some of the causes for the low grades before refusing to admit the student.)

_____ Be able to meet all graduation requirements

_____ Have an acceptable citizenship record

_____ Have acceptable personal qualities and characteristics needed for office occupations

_____ Have emotional maturity

_____ Be receptive to instruction and training

_____ Be recommended by teachers and counselors

_____ Be in good enough physical condition to be employed part-time while attending school.

Evaluation of the Cooperative Office Education Program by Employer

Date __________

Kind of Job__________________ Company____________

Do you feel the in-school instruction was correlated with the student's work experience?__________________

Was the teacher-coordinator's supervision of the working student adequate and helpful?____________________

Was the student well selected for the training station?_____________________

Did the teacher-coordinator analyze the job to find out the instruction needed by the student?____________________

Did the student have or develop the right kind of work habits for the job being done?______________________

Was there a noticeable difference between this student and another high school student who just wanted a job?___________

Did the teacher-coordinator visit the work station often enough?________________
Explain:

Do you think the school should continue this combined school and work program?______________________

Please make any comments or suggestions for the improvement of the program on the back of this sheet.

Evaluation of the Cooperative Office Education Program
by Parent

Date__________

Was the training station suited to your child's needs?____________________
Explain:

Did your child's experience in this type of program increase interest in school as a whole?____________________

Has your child been helped to form the habit of using time and money wisely?________

Has the experience in the COE program given your child a better chance for promotion or salary increase?__________________

Has your child made a noticeable improvement in self-control?________________

Did COE help your child understand and get along with people better?____________

Did your child's grooming improve during participation in COE?_______________

Was there a noticeable increase in the poise shown by your child?________________

Did you notice any personality development through the instructional experience your child had in this program?___________________

On the basis of your experience, what suggestions would you make for improving COE?

COE-36

Evaluation of Cooperative Office Education Class and Program by Student

Date__________

Has the experience you have received in your instructional program been valuable to you?____________________

Could on-job instruction have been improved?______________ If so, how?

Did the in-school instruction tie directly with the work you were doing on the job?____________________

What subject do you think could have been left out of your course?

What other subject units do you think should have been included in your course?

Do you think this instruction will help you in other jobs?__________________

Could you suggest a better arrangement of the subject units in your course?__________________

Have you developed more confidence in yourself because of your part-time occupational training?_________________

What kinds of classroom activities did you like best (discussion, reports, interviews, demonstrations, etc.)?

____

____

EVALUATION OF COE TEACHER BY STUDENT

Please check the response which you believe most nearly describes your teacher. It is not necessary to evaluate every item or to give comments for each. However, with very high or very low ratings, a comment would be most helpful to your teacher.

THE TEACHER:	ALWAYS	USUALLY	SOMETIMES	NEVER	NOT APPLICABLE	COMMENTS
is friendly						
uses words that I understand						
speaks clearly (can be heard and understood)						
has a good sense of humor						
is fair in dealing with students						
understands and is interested in high school students						
spends time helping individual students						
compliments students for good work						
encourages students to do their best						
is confident in answering questions and is willing to admit lack of knowledge						
stimulates interest and curiosity in the subject						
wastes class time talking about unimportant things						
has class work well organized						
uses a variety of teaching methods and materials (list under comments those you like best)						
maintains control of the class						
explains new materials sufficiently						
gives necessary review on difficult materials						
assigns a reasonable amount of homework						
explains the grading system and uses a grading system that is fair						

EMPLOYER'S STUDENT PROGRESS REPORT
Cooperative Office Education

Student__________________________ **Office**__________________________

Supervisor__________________________ **Telephone**__________________________

RATING CODE: 1 = Very Good 2 = Good 3 = Average 4 = Poor 5 = Very Poor

CHARACTERISTICS	GRADING PERIODS					
	FIRST	SECOND	THIRD	FOURTH	FIFTH	SIXTH
1. QUALITY OF WORK (Please try to compare with others of equal experience)						
2. SKILLS: Use of telephone, Typing, Filing, Proofreading, Shorthand, Business Machines, Use of English						
3. QUANTITY OF WORK: Good use of time; (Please try to compare amount produced with others of equal experience)						
4. DEPENDABILITY: Understands and follows directions; follow through on job; works without direct supervision; perseverance						
5. COOPERATION: Adaptability to job; works well with others						
6. INITIATIVE: Does things without being told whenever possible						
7. ATTITUDES TOWARD SUPERVISION: Accepts constructive criticism; tries to improve						
8. GENERAL ATTITUDE: Toward job, superiors, others in the office; Shows respect						
9. ATTENDANCE: Compare actual attendance with hours assigned						
10. PUNCTUALITY: Consider times late not necessarily reasons for being late						
11. APPEARANCE: Dressed appropriately for the office; personal neatness						
12. PERSONAL TRAITS: Speech, Manners, Tact, Patience, Personality, Maturity						

Note to Job Supervisor: Your checking of this progress report will assist the coordinator in helping the student to be a better employee for you. Please make additional comments on the back concerning any areas in which you feel the student could use special help in the classroom--personality characteristics, work habits, skills, etc.

EVALUATION PERIOD 1--Date____________________ Supervisor__________________________

EVALUATION PERIOD 2--Date____________________ Supervisor__________________________

EVALUATION PERIOD 3--Date____________________ Supervisor__________________________

EVALUATION PERIOD 4--Date____________________ Supervisor__________________________

EVALUATION PERIOD 5--Date____________________ Supervisor__________________________

EVALUATION PERIOD 6--Date____________________ Supervisor__________________________

COE-39

(PLEASE MAKE COMMENTS ON BACK)

COMMENTS

FIRST GRADING PERIOD

SECOND GRADING PERIOD

THIRD GRADING PERIOD

FOURTH GRADING PERIOD

FIFTH GRADING PERIOD

SIXTH GRADING PERIOD

EMPLOYER'S STUDENT PROGRESS REPORT

Name of Business ______________________________ Phone ________________

Address ______________________________ Job Supervisor ________________

Student ____________________ School __________ Coordinator ____________

KNOWLEDGE OF JOB				
Typewriter				
Business Machines				
Shorthand and Transcription				
Filing				
Use of Telephone				
Grammar, Spelling, Punctuation				
Proofreading				
Office Housekeeping & Use of Supplies				
PRODUCTIVITY				
Quantity of Work				
Quality of Work				
DEPENDABILITY				
Understands and Follows Instructions				
Follows Through on Job				
Works Without Supervision				
Punctuality				
Attendance				
INITIATIVE				
Assumes Responsibility				
Inquiring Attitude				
COOPERATION				
Willingness to Cooperate				
Adaptability to Job				
APPEARANCE				
Personal Neatness				
Appropriately Dressed for Work				
ATTITUDE				
Accepts Correction				
Tries to Improve				
Shows Proper Respect for Employers, Co-Workers, and Customers				

RATING SCALE

A - Above Average

S - Satisfactory

B - Below Average

U - Unsatisfactory

N - Too New to Appraise

X - Doesn't Apply

Please record additional comments on the back of this page.

COMMENTS - 1st Quarter

Date________________________ Supervisor_________________________

COMMENTS - 2nd Quarter

Date________________________ Supervisor_________________________

COMMENTS - 3rd Quarter

Date________________________ Supervisor_________________________

COMMENTS - 4th Quarter

Date________________________ Supervisor_________________________

SAMPLE FACULTY EVALUATION FORM

TO: ______________________________

______________________________ has applied for the COE Program for next school year. In order to determine this student's potential for probable success in an office job, I would appreciate it if you would assist me by completing the following evaluation and returning it to me by ________________________. The student will not see this evaluation. It is only to assist me in determining what position would be most appropriate for this student. Thank you for your assistance.

For each characteristic, please circle the word which best describes the applicant.

1. Ability to learn . . . . Quick Fair Slow
2. Transfer of learning to other situations . . High Average Low
3. Initiative . . . . Exceptional High Fair None
4. Productivity . . . . Exceptional High Fair None
5. Judgment . . . . Sound Average Poor
6. Reliability . . . . Outstanding Ordinary Unreliable
7. Perseverance . . . . Outstanding Ample Moderate Weak
8. Leadership Quality . . . . Pronounced High Average Low
9. Attendance . . . . . . Rarely absent Average Frequently absent
10. Punctuality . . . . Rarely tardy Average Frequently tardy
11. Appearance . . . . Very neat Neat Careless Slovenly
12. Acceptance of Authority . . . . Outstanding High Average Low
13. Acceptance of Criticism . . . Cooperative Indifferent Defensive
14. Ability to Mix . . . . Natural Fairly good Doubtful
15. General Conduct . . Very Pleasant Courteous Discourteous Rude

Would you employ this student? ______________________________

Additional comments which might be helpful to me in placing this student:

____

____

____

Thank you,

Coordinator's Name

SAMPLE STUDENT INTRODUCTION CARD*

(Front of Card)

INTRODUCTION

This will introduce ______________________________ who is enrolled in the

Cooperative Office Education program at ______________________________.

This student is interested in the position of ______________________________.

Report to: Firm ______________________ Interviewer ______________

Address ______________________________ Phone ______________

Appointment Date ______________ Time ______________

(SCHOOL NAME)

(SCHOOL ADDRESS) ______________________

Teacher-Coordinator

Please complete the other side of this card and return to school in the attached, self-addressed envelope.

(Back of Card)

EVALUATION OF ______________________ DURING INTERVIEW:

APPEARANCE	☐ Favorable	☐ Acceptable	☐ Unfavorable
POISE	☐ At Ease	☐ Composed	☐ Nervous
ATTITUDE	☐ Cocky	☐ Cooperative	☐ Reserved
VERBAL EXPRESSION	☐ Clear, Logical	☐ Unclear	☐ Poor Grammar

☐ Will accept for employment: ☐ Summer ☐ Fall

☐ Will not accept for employment. Reasons: ______________________________

____

Date ______________ Signature ______________________________

Things student can do to make a more favorable impression during future interviews. ______________

____

____

---

*Adapted from a card developed by Dr. Elaine F. Uthe as part of a set of materials on cooperative vocational programs developed during a project at Michigan State University. Information about this outstanding project can be obtained by writing Dr. Uthe at 3345 Carriage Lan Lexington, KY 40502.

COOPERATIVE OFFICE EDUCATION

TEACHER'S INTERVIEW EVALUATION FORM

Student Interviewed: ____________________

	Above Average	Average	Poor
Appearance			
Personality			
Desire to be enrolled in program			
Ability to communicate			
Concept of program's purpose			

Student's plans following high school ____________________

____

Work experience ____________________

____

Reaction when asked if he/she would change personal appearance in order to become employable, or keep employment.

____

____

Reaction to FBLA ____________________

Questions: ____________________

____

____

Comments: ____________________

____

____

Student Self-Evaluation
of Deficiencies Often Found in Office Workers

Office supervisory personnel have found that beginning office workers have some common deficiencies. These are pointed out to COE coordinators year after year. Place a check by any you think may apply to you. During this year, we will work to correct or eliminate as many of these deficiencies as possible so that you will be BETTER THAN most beginning office workers.

__ Can't spell; doesn't correct errors
__ Illegible handwriting
__ Can't type quickly or accurately
__ Doesn't make typing corrections that are undetectable
__ Can't compose business letters
__ Doesn't answer phone correctly
__ Doesn't record messages carefully and completely
__ Arithmetic skills weak
__ Filing skills weak
__ Bookkeeping knowledge weak
__ Shorthand skills inadequate
__ Needs skill in machine transcription
__ Poor speech and grammar
__ More skill needed in use of adding machines and calculators
__ Lack of skill in use of duplication machines
__ Lacks maturity; is giddy, silly
__ Wastes time, supplies
__ Does not follow instructions
__ Does not take notes to help remember details
__ Lacks initiative, drive
__ Can't get along with people
__ Lack of respect for work
__ Doesn't accept responsibility
__ Poor attendance record
__ Excessive tardiness
__ Discourteous, rude
__ Has a "world owes me something" attitude
__ Has a "what's in it for me" attitude
__ Unable to accept criticism

What will you do to improve in any of the areas you checked above?

STUDENT SELF-EVALUATION OF WORK HABITS AND ATTITUDES

Rate yourself honestly on each item below. Your improvement from one grading period to the next will ensure your success in your future job.

	Always	Often	Seldom	Never
Do you get to class on time?				
Do you greet others in a friendly and cheerful way?				
Do you begin work immediately and work all hour?				
Do you keep your desk neat and orderly while working and put all materials away at the end of the class?				
Do you accept new jobs and extra tasks willingly and cheerfully?				
Do you offer to help others who need help?				
Do you hide your annoyance when your work is interrupted?				
Do you work cooperatively with others on group projects?				
Are you careful when using equipment?				
Do you follow instructions carefully?				
Do you proofread (check for accuracy) before handing in work?				
Is your work the best you are capable of doing?				
Do you try to do more than the minimum requirement?				
Are you genuinely concerned when you miss a day's work? Do you make up missed work promptly?				
Do you accept criticism intelligently and graciously?				
Do you offer help to teacher when the need arises?				
Do you attempt to find supplies yourself before asking?				
Do you put supplies back where you got them when finished with them?				
Are you economical in using supplies?				
Do you try to solve problems yourself before consulting teacher or other students?				
Do you consult reference books when unsure of correct procedures?				

COE TRAINING STATION EVALUATION

by student

Student's Name ____

Employer ____

Supervisor's Name ____

Present duties: ____

____

How long employed by above company? ____________ weeks

Is your job what you expected it to be? _______ Yes _________ No. Explain.

Were you given ample instruction when you started the job? ____ Yes ____ No

Are you under daily supervision? ____ Yes ____ No

If so, name of supervisor ______________________________

Are you given helpful instruction when you need it? ____ Yes ____ No

Are fellow employees friendly and courteous? ____ Yes ____ No

Do you feel advancement is available to you if you were working full time? ____ Yes ____ No

Were the company's rules and regulations explained clearly? ____ Yes ____ No

Please rate your supervisor on the following points:

- Introduced you to all employees in department ____ Good ____ Average ____ Poor
- Explains changes which affect you ____ Good ____ Average ____ Poor
- Is interested in you and your job ____ Good ____ Average ____ Poor
- Counsels with you regarding problem areas ____ Good ____ Average ____ Poor

Working conditions in your business are . . . (explain) ________________________

____

What do you like best about your job?

What can you suggest that would make the working conditions better for future COE students?

CHECKLIST FOR EVALUATING STUDENT TRAINING STATIONS

Do you find that the station

_____ is located so that transportation to and from home and school is not too time-consuming or costly.

_____ has satisfactory employee morale.

_____ has equipment and facilities which are adequate, reasonably modern and in good condition.

_____ provides a physical and moral environment which is safe and beneficial for the student.

_____ observes Federal and State laws and employment regulations.

Do you find that the training station is willing to

_____ provide instruction, not merely obtain part-time employees.

_____ provide a wide variety of learning experiences compatible with individual needs and capabilities.

_____ develop jointly with the coordinator a Training Plan.

_____ work closely with the student and the coordinator to improve instruction.

_____ make instructional materials available to the student and the coodinator.

_____ designate supervisory personnel who will direct the student training competently and with enthusiasm.

_____ confer periodically with the COE coordinator and evaluate the student in writing.

_____ provides employment which meets or relates to career interest of the student.

_____ employ the student for at least 15 hours per week for the entire school year and establish a reasonable working schedule for the student.

_____ discuss opportunities for advancement and full-time employment.

_____ provide a beginning wage comparable to other part-time workers doing the same work.

SAMPLE LETTER TO ENCLOSE WITH BUSINESS COMMUNITY SURVEY

Current Date

Name of Business
Address of Business

Dear ________________________:

_________________High School is studying the feasibility of establishing a Cooperative Office Education (COE) program. Students in a COE program attend classes part of the school day and work part time in training stations in local business offices. A teacher-coordinator correlates the in-school instruction with the student's on-the-job training.

The COE program requires the support of the community. We are conducting a survey to ascertain approximately how many employers might support the program by providing part-time office employment for students enrolled in the program. The survey will also provide information which will be used to improve classroom instruction so that we may better meet the needs of local businesses.

A school representative will call for an appointment to collect the completed survey form and answer any questions you may have. The interview will be brief.

Your cooperation in completing this survey will be greatly appreciated by the school and the students who may be the future employees of the business firms in this community. Thank you for your assistance in helping determine the need for this program.

Sincerely yours,

xx

Enclosure

SAMPLE PARENT LETTER
(Type on school letterhead.)

COOPERATIVE OFFICE EDUCATION PROGRAM
___________HIGH SCHOOL

Dear Mr. and Mrs.___________:

At this time each year we counsel with students concerning their vocational interests. Your son/daughter has indicated an interest in our Cooperative Office Education (COE).

Cooperative Office Education is a unique experience for any young person. It gives the student an opportunity to study office occupations on the job.

The advantages to ___________ would be many; earning money while receiving school credit, working within a controlled, carefully supervised program, and learning about career opportunities in business. This program has merit for every student whether or not further education at a college or technical center is part of their future plans.

If___________enrolls in COE, he/she would be assuming the following responsibilities:

1. Regular attendance in school and on the job.
2. Student cannot report for work in the afternoon if absent from school in the morning without the coordinator's permission.
3. The employer and school must be notified if the student must be absent from work.
4. Each member in the office occupational program in which COE students are trained should hold membership in the National, State, and local Future Business Leaders of America (FBLA) student organization.

Our brochure, entitled "COE at ___________High School" is included with this letter to provide information on Cooperative Office Education. If you have additional questions, please contact me at ___________.

Sincerely,

COE Coordinator

XX
Enclosure

*This should be a personalized letter.

COE-51

STUDENT ACCEPTANCE LETTER

(Type on school letterhead)

Student Name
and Address

Dear __________:

Congratulations! You have been selected to participate in the Cooperative Office Education Program for the coming school year.

You will be representing your school and your community as well as establishing your work experience record in the community; therefore, it is very important that you get off to a good start.

Because I will soon begin to look for just the right training station for you, it would be helpful if I could get to know you better. I also have a short test that I would like for you to take to give me some idea of your abilities in certain areas.

Our first orientation meeting will be held ____________________
in Room____________at _________p.m.

Sincerely,

COE Coordinator

CK:ck

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END-OF-YEAR THANK YOU LETTER TO EMPLOYER

(Type on your school letterhead)

Current Date

Mr. Good Employer
Training Station
Yourtown, AZ #####

Dear (employer's name) :

Thank you for your participation as a Cooperative Office Education employer this school year. I have enjoyed working with you and hope that you, your staff, and (student's name) have benefited from this program.

We appreciate your support of our COE program. If there is any way in which we can help you, please don't hesitate to call.

Thank you for your cooperation this year. I hope to have the continued pleasure of working with you again next year.

Sincerely,

(Typed Signature)
COE Teacher-Coordinator

urs

AGENDA FOR COE PARENTS' ORIENTATION

What is COE: COE (Cooperative Office Education) is a program for high school seniors to earn high school credit while receiving on-the-job training and valuable experience in an office occupation for usual pay for that job. (Most employers pay minimum wage.)

Credit for Class and Job: Students must enroll in the program for the full school year. Credit will be granted for class and for job. There may be a provision for students to do extra projects during regular work time to earn credit if their job doesn't start until a few weeks after school begins, etc., to avoid losing their credits. Explain the specific policies of your school or district.

COE Grading System and Absenteeism Policies: Explain your grading system and absenteeism policies. Be sure to familiarize yourself with local or district policies. For suggested guidelines, REFER TO: COE page 55, Policies.

Job Requirements: Student is expected to work an average of 15 hours per week minimum for the school year -- actual work hours will depend on requirements of student's employer. School holidays are not automatically work holidays. Student are responsible for working as required by their employer and must obtain the employer's permission in advance for any days off. If student is sick, it is student's own responsibility to notify employer if unable to work that day. Students are also expected to notify instructor ahead of time if they will not be in class for any reason.

Class Requirements: Student works on various assignments and projects covering areas and skills important in office jobs. If the employer indicates that a particular type of assignment would be helpful on their job, student will be working in class on the area indicated. The rest of the time students will be doing assignments to gain expertise in areas of value in present as well as future employment. Some of the topics covered include businesslike use of telephone, filing, operation of various office machines (Xerox machine, adding machine, calculator, transcription machine, etc.) as well as job application letters and interviewing procedures.

Related Organization - FBLA/PBL: Future Business Leaders of America/Phi Beta Lambda is the student organization for students who are interested in business. COE students may be required to join this organization. (Check local or district policies -- be sure it is in writing and signed by student and parent if FBLA/PBL membership is required.) This is their opportunity to meet with and compete against students from other schools in the state in areas of business (to help eliminate nervousness in taking tests for employment purposes). Students will be expected to participate in fund-raising activities for the Employer Appreciation Event in the Spring.

COE POLICIES

(Grading, Credit, Termination, and Absenteeism)

The COE student works an average of 15 hours minimum per week for pay at the usual rate for a beginning worker in the job he/she does. The student receives 2 hours of school credit per school year for the work release time and 1 hour of credit per school year for the classroom work. Since the basis for credit given for on-the-job training in the COE program is the number of hours worked, the student will be required to submit a report of hours worked each week.

One report card grade will be issued each grading period for the classroom activities. This grade will be determined by the instructor-coordinator based upon the student's classroom performance in the same manner as a grade in any other class is calculated.

A separate report card grade will be issued each grading period to indicate whether or not the student's job performance has been satisfactory. This grade will be issued by the teacher-coordinator based upon conferences with the employer and a written evaluation completed by the employer.

The student must remain in both the classroom and on-the-job training phases of the COE Program for the entire school year. It is the student's responsibility to provide transportation to the job. If, for any reason, the student wishes to quit the job and/or withdraw from the COE class, the student must first discuss the situation with the COE teacher-coordinator to enable the student, the school, and the employer to work out a solution for the best of all concerned.

If the student quits the job without first consulting the teacher-coordinator or if the student is dismissed from the job for some reason due to the student's inadequate job performance, the student may be terminated from the COE Program and may be denied credit for both the work experience as well as the classroom activities for the entire school year. The grade would be recorded as a failing grade on the student's transcript for both the classroom and job time. A student's "inadequate performance" on the job would be determined jointly by the employer, the teacher-coordinator, and the student in conferences among all of them.

Membership in FBLA (Future Business Leaders of America), the co-curricular student organization for business students may be required of all COE students. All COE students will be expected to participate in the various fundraising activities to raise money for the end-of-year employers appreciation event held in the spring.

Students accepted for the COE Program are expected to be dependable both in school as well as on the job. Occasional problems arise when a student is absent from both school and work or when a student reports for work on days the student has been absent from school. Therefore, the student will be required to notify the teacher-coordinator before class time (preferably before 8 a.m.) if the student must be absent from class. The school cannot grant permission for the student to be absent from work. Therefore, the student must also notify the employer as early as possible if the student will be unable to work on a regularly scheduled work day. Violations of the absenteeism policy could result in dismissal from the COE Program and a resulting loss of credit as outlined above.

I have read the above information regarding COE policies and agree to the terms and conditions set forth above.

_______________________________ _______________
Student's Signature Date

I have read the above information regarding COE policies and agree to the terms and conditions set forth above. I wish to have my son/daughter participate in the COE Program at _____________ High School and agree to assume responsibility for transportation to and from the student's job.

_______________________________ _______________
Parent's Signature Date

NOTE: The above policies are suggested guidelines. This form should be revised as necessary to fit school and/or district policies before being used.

ORIENTATION TO COE

Classroom Organization

Explain how the classroom will be organized, emphasizing that students will be responsible for completing many units on an individual basis.

Establish classroom rules and guidelines, having students sign any forms necessary to make enforcing the rules possible. Tardiness and absenteeism are two areas usually addressed at this time. Other guidelines followed by the district, school, department, or individual teacher should also be discussed at this time. REFER TO: COE page 55, Policies.

HINT: Importance of tardiness and absenteeism on the job in terms of how it could affect the paycheck or cause loss of job is a good way to explain to students why their class grade may be lowered for breaking such classroom rules and guidelines. BE SURE TO GET THE STUDENT'S SIGNATURE ON SOME TYPE OF FORM STATING SUCH RULES BEFORE TRYING TO ENFORCE THEM.

Student Responsibilities in the Classroom

Be sure all students have purchased necessary textbooks, supplies, etc., from the bookstore and/or set deadlines by which students must bring materials to class. Be sure students are aware that they may need to purchase some supplies or materials during the year. Specify which materials must be brought to class at various times. Emphasize that it is the student's responsibility to bring to class any materials for an assigned individual unit as supplies are needed. State which supplies will be available in the classroom and which items students must bring as needed. Distribute a copy of the COE Student's Weekly Activity Report and explain how students are to complete it, when it will be due, etc. REFER TO: COE pages 63-64, Sample COE Student's Weekly Activity Report.

HINT: The Weekly Activity Report can be used for grading purposes by assigning students a weekly class grade based on how efficiently and productively the student has used class time. This weekly grade is also a good place to incorporate penalties for not following established class procedures that week (Example: lower weekly grade if student failed to call coordinator prior to an absence from class).

Remind students to discuss with the coordinator any problems or situations that may occur on the job with which students may need additional classroom training or advice from the coordinator.

Review Training Plan with students. Determine which competencies each student already has and the priority of each student's instructional needs. REFER TO: COE page 3-6, COE Related Classroom Instruction. Identify student needs for Individualization of Instruction.

Goals and Objectives of the COE Program

Review goals and objectives of COE program. Be sure that all students understand that their class assignments will be designed to: (1) teach them competencies needed on all office jobs, (2) help them develop and refine skills and knowledges needed on their present job, (3) help them develop skills and knowledges needed or useful for obtaining promotions at their present place of employment or in obtaining other business jobs after completion of the COE program.

ORIENTATION TO COE (Continued)

Student Responsibilites on the Job

Discuss positive attitudes and qualities necessary for job success. This will probably be a fairly short discussion at this time emphasizing the most important qualities now and reserving detailed coverage for later. REFER TO: HUMAN RELATIONS SKILLS.

Review students' responsibilities to their employers. Be sure they realize it is their responsibility to notify their employer if they are sick and will be unable to attend work that day. They must also arrange in advance with the employer if they will need time off for a dentist appointment, etc. Be sure to re-emphasize the importance of daily attendance on the job and the need to be on time for work each day. It is also the students' responsibilities to keep track of daily working hours and to clarify working assignments with their employers. Clarify the fact that a school holiday is not necessarily a holiday on the job. Time off the job depends on the employer's holidays, not school holidays.

Remind students that each should have a training agreement signed by the student, parent, employer, and coordinator. REFER TO: COE page 72, Sample Training Agreement.

Job Placement Procedures and Policies

Review procedures relating to job placement. Include procedures for finding a job (interviews arranged by coordinator and/or inquiries made by the student) how student may earn class credit by doing assigned projects until a COE job has been obtained, policies regarding what happens if students lose or quit COE jobs. REFER TO: COE page 55, Policies.

HINT: BE SURE POLICIES REGARDING STUDENTS' LOSING OR QUITTING THEIR JOBS ARE IN WRITING AND SIGNED BY STUDENT AND PARENT. Usually a student is not allowed to quit a COE job without first discussing the situation with the coordinator. If the coordinator has determined that there is some reason relating to the job which makes it in the best interests of the student and/or the COE program for the student to quit the job, then the coordinator will attempt to place the student in another COE job. If the student quits the job without consulting the coordinator and without adequate reasons, the student may lose credit for the COE program and not receive the coordinator's assistance in finding another job. If a student loses the COE job, the coordinator, student, and employer must determine the reason why the student is being terminated. Generally if the job loss is not due to the student's job performance (such as being laid off due to lack of work, budget cuts, etc.), then the coordinator will attempt to place the student in another job. However, if the job loss is due to the student's poor performance (the student, coordinator, and employer will have had conferences atempting to resolve job performance problems prior to the student's termination, but the student has failed to improve job performance as needed), then the same rules apply as if a student quits the job without adequate cause and the student will lose credit for the COE program and not receive the coordinator's assistance in further job placement. KEEP IN MIND THAT DISTRICT OR LOCAL SCHOOL POLICIES MUST BE COMPLIED WITH IN DEVELOPING THE RULES AND PROCEDURES GOVERNING STUDENT JOB PLACEMENT.

Remind students to discuss with the coordinator any problems or situations that may occur on the job with which students may need additional classroom training or advice from the coordinator.

SAMPLE EMPLOYER CONTACT CARD

Employer________________________ Phone Number__________

Address_________________________ Supervisor____________

________________________________ Best Time to Call_______

Required Skills______________________________________

Duties to be Performed_______________________________

Starting Date__________ Starting Salary________ Work Hours__________

STUDENT INTERVIEWED	DATE	TIME

Student Hired____

(Record phone calls, visits, conferences, etc. on the back of the card.)

SUGGESTED RECRUITMENT AND PUBLICITY ACTIVITIES

1. Prepare and distribute brochures explaining business careers, program of study, and the COE Program.

2. Visit all business classes to discuss employment opportunities and the COE Program.

3. Conduct tours of the business department.

4. Prepare a recruitment bulletin board, window display, marquee, etc.

5. Conduct a recruitment assembly, if appropriate.

6. Invite counselors, administrators, prospective employers, etc. to a tea or breakfast to discuss business classes available and the COE Program.

7. Sponsor a "Secretarial Olympics" or similar event to acquaint students with the business department. This can be a scavenger hunt or similar type activity in which all students can participate. It can include such things as getting an autograph from a second-year shorthand student, visiting the business machines classroom to learn the name of one of the business machines, etc. as well as competitions among the various skills in the business classes.

8. Develop an album or scrapbook. Show it to students, other faculty members, prospective employers, parents, community groups, etc.

9. Show an up-to-date slide presentation. (One is available from the State Department of Education. Contact the State Supervisor of Business Education to borrow it.)

10. Speak to (and have students speak to) community groups to explain and promote the COE Program. Include such groups as Rotary, Lions, etc.

11. Make arrangements for yourself and/or your COE students to appear on an "Open Line" or similar such local radio or TV program to explain, answer questions, and promote the COE Program.

12. Invite students, parents, other faculty members, business people, administrators, counselors, state legislators, prospective employers, etc. to visit your classroom when a special project is being done in class.

13. Contact the chamber of commerce or other representative of a community organization publicizing a calendar of community events to be sure your club events are included on the community calendar.

14. Send thank you notes each time a business person, parent, other faculty member, administrator, etc. assists with your program in any way.

15. Arrange with the librarian or career center supervisor to highlight business careers during your recruitment process.

16. Invite a current employer to speak to students and/or community group meetings with you to help publicize how much the COE Program helps employers as well as students.

17. Develop a special presentation promoting COE as part of a parents night program in your school. If there is not a school parents night, hold your own parents night for parents of students in all business classes.

18. Arrange for or participate in a Career Day program.

19. Prepare news releases for the school newspaper, parent newsletter, local newspaper, radio or TV station, etc. Be sure to do this prior to each event so the community is aware the event will be taking place. Also include news releases after each event at which your students have participated in competitions to publicize your local winners.

20. Participate in assembly programs presenting a skit, pantomime, slide show, film, fashion show, etc. highlighting one or more aspects of office work or the COE Program.

21. Plan and conduct an installation ceremony to install new officers of your student organization. Invite parents, etc, to attend the ceremony.

22. Conduct a "Get Acquainted" day for incoming freshmen to familiarize them with the business department and the sequence of classes offered. Members of your student organization could serve as a "Big Brother" or "Big Sister" to the freshmen students.

SAMPLE END-OF-YEAR REPORT

I. PURPOSES, GOALS AND OBJECTIVES OF COE

II. PHYSICAL PLANT
  A. Present Facilities
  B. Recommendations for Improvement
    1. Capital Outlay--Additional Facilities Needed
    2. Service and Repairs

III. CURRICULUM
  A. Improvements Made During the Present School Term
  B. Recommendations for Improvement

IV. STUDENT DATA
  A. Enrollment
  B. Earnings
  C. Graduates
  D. Placement Service
  E. Follow-up
  F. Recruitment
  G. Prospects for Coming School Term
  H. Recommendations

V. STAFF
  A. Qualifications of Present Staff
  B. Activities of Present Staff
  C. Recommendations

VI. PUBLIC RELATIONS
  A. Within the Department
  B. With Administration
  C. With Other Departments of the School
  D. With the Community
  E. Recommendations for Improvement

VII. FBLA/PBL ACTIVITIES

VIII. SUMMARY

COE STUDENT'S WEEKLY ACTIVITY REPORT

Student's Name______________________________ For the Week of ____________ to ____________

NOTE: ANY TIME YOU ARE TARDY OR ABSENT FROM CLASS WITHOUT NOTIFYING THE TEACHER-COORDINATOR AHEAD OF TIME, IT MAY AFFECT YOUR WEEKLY GRADE.

Under Classroom Activities indicate the specific activity or assignment worked on in class that day and the amount of time spent on each. (Examples: Filing lesson 2, 20 min.; Calculator Job 8, 15 min.; Classroom discussion about job problems, 10 min.; Conference with coordinator about work hours, etc.) Also account for any time you are not in class. (Examples: Left early for dental appointment; Sick today; Excused for music group performance, etc.) Record the Date.

Under Hours Worked indicate the actual times in the top half of the box (1:00-4:30). In the bottom half of the box record the total hours (3½) for each day. Under On-The-Job-Activities describe your duties at work that day. Account for time off regular work hours. (Examples: Doctor appointment; Sick today; Slow week so I didn't need to go in today;etc.)

Day	Date	Time In	Time Out	Classroom Activities	Hours Worked	On-The-Job-Activities
Monday						
Tuesday						
Wednesday						
Thursday						
Friday						
TOTAL HOURS WORKED THIS WEEK:				Saturday		
				Sunday		

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NOTE: BE SURE TO COMPLETE BACK OF FORM.

COE-64

Back of COE Student's Weekly Activity Report

1. What were your new activities in class this week?

2. What were your new activities on the job this week?

3. What classroom learning did you apply on your job this week?

4. What problem or situation developed with which you would like help? (in class or on the job)

5. What mistakes did you make? How did you handle them? (in class or on the job)

6. Describe the most interesting incident or experience you had this week. (in class or on the job)

7. Is there anything else of interest that I should know about your job?

COOPERATIVE OFFICE EDUCATION

Application for Admittance

NAME: ____ SOCIAL SECURITY NO: ____________

AGE: ______ DATE OF BIRTH: ______________________________ HEIGHT: ______ WEIGHT: ______

ADDRESS: ____ TELEPHONE: ____________

DRIVERS LICENSE? ______ ACCESS TO A CAR? ______ INTERESTED IN SUMMER EMPLOYMENT? ______

PARENT OR GUARDIAN NAME: ______________________________ OCCUPATION: ____________

PARENT OR GUARDIAN ADDRESS: ____

INDICATE THE TYPE OF OFFICE IN WHICH YOU PREFER TO WORK. (List Choices) (Bank, Dental, Department Store, Legal, Manufacturing, Business, Medical, School, etc.)

FIRST CHOICE: ______________________________ SECOND CHOICE: ____________

REASON FOR ABOVE PREFERENCE:

Do you attend school regularly? ______ Absences to date (this year) ____________________

Major reason for absences: ____

Are you under a doctor's care? ______ Do you have any health problems which would interfere with your regular attendance on a job? ______ If so, please explain. ____________________

Have you ever worked full or part time? ______ Where? ______________________________

Type of job: ____

Are you currently employed? ______ If yes, where? ______________________________

____

Do you intend to further your formal education after high school? ____________________

Type your present schedule of classes on the back of this form.

PLEASE ATTACH A PERSONAL DATA SHEET. Include as references names of three teachers who can attest to the quality of your work.

TO THE STUDENT:

Cooperative Office Education provides an opportunity to be considered for employment in the offices of businesses and industries in our area. When you enroll in COE, you indicate that you are sincerely interested in putting forth your best efforts to receive on-the-job training. If you accept this responsibility, please sign in the space provided:

____
Student-Learner

TO THE PARENT OR GUARDIAN:

Do you consent to your daughter or son entering the Cooperative Office Education Program and do you agree to cooperate with the school and the training agency in making the training and education of the greatest possible benefit to your daughter or son? If so, please indicate your support and approval with your signature.

____________________ ______________________________
Date Parent or Guardian

COE-65

SAMPLE STUDENT PROFILE SHEET

Student's Name ____________________ Phone No. ____________________
Address ____________________ Birth Date ____________________
____________________ Soc. Sec. No. ____________________

COE Employer ____________________ Supervisor ____________________
Address ____________________ Phone No. ____________________
____________________ Best Time to Call ____________________

Date Employed ____________________ Starting Salary ____________________
Work Hours ____________________ Raises ____________________
Date Terminated ____________________ Reason Terminated ____________________

Parent's Name ____________________ Home Phone No. ____________________
Address ____________________ Bus. Phone No. ____________________
____________________ Hours Worked ____________________

Emergency Contact ____________________ Phone No. ____________________
Address ____________________ Relationship ____________________

Typing Speed ________ Shorthand Speed ________ Transcription Speed ________
Other Skills and Business Courses Taken ____________________
____
Previous Job Experience ____________________
Health Precautions ____________________
Extracurricular Activities ____________________

Job Interests: First Choice ____________ Second Choice ____________
Interested in Summer Job? ________ Dates Available ____________
Plans After Graduation ____________________

Total Absences: 9th Grade ________ 10th Grade ________ 11th Grade ________
Grade Point Average ________ Class Rank ________ Total Credits ________
Required Classes Still Needed ____________________
____

Interviewed by ____________________ Date ____________ Time ____________

RECORD OF HOURS WORKED

Total Hours Worked This School Year ________

WEEK	DATES	AUG.	SEPT.	OCT.	NOV.	DEC.	JAN.	FEB.	MAR.	APR.	MAY
1st											
2nd											
3rd											
4th											
5th											
TOTAL											

BUSINESS COMMUNITY SURVEY

__________ High School

Name of Business ______________________ Type of Business __________

Address ____

Name of Owner or Manager _________________________ Phone __________

Person Completing Questionnaire _______________ Title _______________

Approximate Number of Full-Time Office Employees:
Male ______
Female ______

Approximate Number of Part-Time Office Employees:
Adult: Male _____ Female _____
Student: Male _____ Female _____

Educational Requirements for Full-Time Office Positions _______________
____

Job Entrance Tests Administered, if any _________________________
Do you have difficulty securing qualified office employees? ___________
If yes, for what types of office positions? _____________________
Does your office employment increase during a particular time of year? _____
If yes, when? __________ For what positions? ____________________

Possible COE Training Stations:

Cooperative Office Education (COE) is a training program in office occupations in which students attend classes part of the school day (including a COE Class) and are employed in offices during the other part of the day. A COE Teacher-Coordinator correlates classroom instruction with on-the-job training.

A. Would you be willing to employ and train COE students? ______________
B. If yes, what types of part-time office positions? ______________.
How many COE students would you possibly employ? ___________
C. If no, please explain ____

Please check below the types of office learning experiences you can provide:

_____ Telephone Usage
_____ Filing
_____ Typewriter
_____ Shorthand Transcription
_____ Machine Transcription
_____ Bookkeeping
_____ Data Entry for Computer
_____ Mail Procedures
_____ Receptionist
_____ Billing Clerk
_____ Ten-Key Adding Machine
_____ Electronic Calculator
_____ Spirit Duplicator
_____ Stencil Duplicator
_____ Offset Duplicator
_____ Word Processor
_____ Payroll Records
_____ Others (Please List)

In your opinion, what are likely to be the best job opportunities in office occupations in the next five years? ______________________________
____

For further information about the COE Program or to request a qualified student part-time employee for your office, please contact ____________________ at __________ High School, Phone __________.

THANK YOU FOR YOUR ASSISTANCE WITH OUR SURVEY TO DETERMINE THE NEED FOR A COE PROGRAM.

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FOLLOWUP QUESTIONNAIRE
FOR COOPERATIVE OFFICE EDUCATION PROGRAMS

Please complete this form promptly, and return to us in the enclosed self-addressed envelope. The information will be utilized in improving or up-dating the current COE Program. All information supplied to us will be confidential.

Name____________________ Maiden Name____________________

Address____

Date________________ Year graduated from high school__________

1. Are you presently employed on a Full-time Basis____ Hrs per week_____
2. Are you presently employed on a Part-time Basis____ Hrs per week_____
3. Title of your job______________________________
4. Duties____________________________________
5. Employer__________________________________
6. Address___________________________________
   City State ZIP
7. Who helped you get your present job?____________________
8. Are you happy with your present job?____________________
9. Have you attended any school since leaving high school? Yes No

   Length of time______________________________

   Did you complete class, course, or graduate?________________
10. Do you plan on going back to school some day, and if so, what course of study would you take? Explain____________________

    ____

    ____
11. What business education subjects taken in high school were the most interesting to you?____________________

    ____

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12. Place a check mark beside each business subject which has been helpful to you on your present job:

____Beginning Typing

____Advanced Typing

____Bookkeeping/Accounting

____General Business

____Beginning Shorthand

____Advanced Shorthand

____Secretarial Block

____Clerical Block

____Business Law

____COE Related Class

____COE On-the-job training

____Office/Business

____Business Math

____Business English

____Office Block

____

13. What business education subject(s) do you wish you would have taken in high school?

____

14. In what areas do you wish you could have received more training (Math, Spelling, Human Relations, Psychology, etc.) ________________

____

15. In your opinion, what were the strengths of the Business Department at ________________ school when you attended?

16. In your opinion, what were the weaknesses of the Business Department at ________________ school when you attended?

Please add any additional comments that you feel will help the faculty of the Business Department at ________________ school improve and better administer its programs.

(SAMPLE FORM)

STUDENT INTEREST SURVEY

I. *Personal*

Date ____________

Name ______________________________
Address ______________________________
Date of birth ______________________ Telephone ________
Grade level ______________________ Homeroom ________
Father's name (or Guardian) ______________________________
Father's occupation ______________________________
Mother's name (or Guardian) ______________________________
Mother's occupation ______________________________

II. *Education and Future Plans*

High school major ______________________________
Plans after graduation ______________________________
Are you interested in preparing for an office occupations career?

yes______ no______ undecided______

Cooperative Office Education is a program in which a student attends school part of the day and works in an office part time. Would you be interested in participating in this program?

yes______ no______ undecided______

If yes, would you be able to provide your own transportation? ______________________

Would you like additional information about the Cooperative Office Education Program?

yes______ no______

List the business subjects you have completed: ______________________________

List the business subjects you are presently taking: ______________________________

List the business subjects you plan to take in your senior year: ______________________________

List your extra-curricular activities: ______________________________

List additional business subjects you would like to see offered:

____

III. *Employment Experience and Plans*

A. List any previous employment:
  1. Name of employer ______________________________
     Responsibilities: ______________________________
  2. Name of employer ______________________________
     Responsibilities: ______________________________
B. Are you presently employed? yes______ no______
   If yes, name of employer ______________________________
   Responsibilities: ______________________________

LABOR AND MINIMUM WAGE LAWS

Labor and minimum wage laws change and are revised frequently; therefore, it is important that COE coordinators have up-to-date information. Sources of information for obtaining answers to question often asked of COE coordinators are:

State Labor Department
1516 North Central
Phoenix, AZ 85004
255-4515

U. S. Department of Labor
1306 North First Street
Phoenix, AZ 85004
261-4223

United States Department of Labor
Employment Standards Administration
Wage and Hour Division
Washington, D.C. 20210

FEDERAL LABOR LAWS
Superintendent of Documents
U. S. Government Printing Office
Washington, D.C. 20402

TRAINING AGREEMENT

Student's Name:________________ Social Security________

Address____________ Zip_____ Telephone Number________

School________________ Telephone Number________

Training Station________ Zip_____ Telephone Number________

Training Supervisor____________ Position________

Student's Occupation____________ Beginning Wage________

Student Agrees:

To be regular in attendance, both in school and on the job.
To abide by the rules and regulations of the employer.
To discuss any problems concerning employment with the coordinator that might lead to termination of employment.
To work a minimum of ______ hours per week.

The Employer Agrees:

To provide a variety of work experiences for the student.
To abide by Federal and State regulations regarding employment and the provisions of an equal opportunity employer.
To assist in the evaluation of the student.
To consult with the coordinator about any difficulties arising at, or related to the training station that involves the student.

Parent Agrees:

To the involvement of the student in this cooperative work experience program and is supportive of it.

Coordinator Agrees:

To provide related classroom instruction as required.
To periodically observe the student on the job and to visit with the training supervisor in order to aid in the student's development.
To consult with the training supervisor in the evaluation of the student.

________________ Student

________________ Parent

________________ Training Supervisor

________________ Coordinator

Date:____________

Program:____________

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TRAINING PLAN for COE students at _______ High School

CODE:

E Everyday
F Frequently
O Occasionally

Leave blank if never performed

Name of student________________________________ Phone No.____________

Name of employer_______________________________ Phone No.____________

Job title:_____________________________________

Job description:____

____

Career objective:____

STUDENT IS ABLE TO COMPETENTLY:

	School Training	Job Experience
TYPING		
Type a variety of letter styles and memos		
Type tabulations and statistical reports		
Type from rough draft or corrected copy		
Type forms		
Type stencils and other master copies		
Type camera ready copy		
Type carbon copies when appropriate		
Compose letters from verbal/written instructions		
Type transcripts from machine dictation		
Develop techniques of careful proofreading		
Make "appropriate" corrections		
Produce all common office typing problems at acceptable rates		
SHORTHAND (if applicable)		
Take dictation		
Transcribe dictation into mailable copy		

	School Training	Job Experience
FILING		
Alphabetically		
Numerically		
By subject		
By geographic location		
Learn and improve the office filing system		
Cross reference properly		
Prepare file folders and labels		
Check out and follow up items		
COMMUNICATIONS		
Perform receptionist duties and make appointments		
Use intercom systems properly		
Answer telephone appropriately		
Take accurate messages		
Handle all telephone situations		
Operate button phones and other available telephone and communications equipment		

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GENERAL OFFICE DUTIES:

	School Training	Job Experience
Run errands		
Handle money appropriately including petty cash and deposits		
Prepare data processing or computer items		
Handle office mail (in and out)		
Prepare invoices (figuring discounts) statements, checks		
Keep inventory records		
Use reference sources properly		
Keep work areas clean and tidy		
Perform hostess duties		
Replenish supplies when necessary		
Organize desk or work areas		

Future Plans:

BUSINESS MACHINES

	School Training	Job Experience
Run available duplicating equipment		
Use full capacity of calculators available		
Use transcribing machines		
Other machines (list)		

OTHER COMPETENCIES (list)

	School Training	Job Experience

Beginning Typing Speed ____________

Ending Typing Speed ____________

Ending Shorthand Speed ____________

Ten-Key by touch ____________

BASIC REQUIREMENTS OF THE TRAINING PLAN

Each teacher-coordinator will try to develop a training plan that is workable for the individual; however, every training plan should meet certain basic requirements:

1. Vital data

   Name of student
   Name of firms and supervisor
   Telephone numbers of both student and supervisor
   Career area or specific occupation

2. Format

   Should be workable, easy to use

3. Competencies

   Should be easily identifiable

4. Check-off system

   Provision should be made for checking off when competencies are achieved

5. Evaluation

   Have means of measuring how well the outcomes were achieved

6. Flexibility

   Provision for coordinator, student, and employer input initially and an on-going modificaiton of the Training Plan as needed. It must be a changing educational tool.

7. Attractive and easy to locate

   Consider use of colored paper, card stock, variable print, etc.

CERTIFICATE OF COMPETENCY

this is to certify that

____

has demonstrated competence in the skills
listed on the reverse side of this certificate
in the area of

COOPERATIVE OFFICE EDUCATION

Completion date	School	Instructor

The following units of instruction were completed in the COE classroom and/or in the office

of

under the supervision of the COE Coordinator and

_______ Telephone Techniques
_______ Meeting the Public
_______ Records Management (Filing)
_______ Using Mail and Shipping Services
_______ Qualities for Job Success
_______ Efficient Time and Task Management
_______ Using Reference Materials
_______ Getting and Keeping a Job

_______ Business Correspondence and Reports
_______ Dictation, Transcription
_______ Information Processing Terminology
_______ Reprographics (Duplicating)
_______ Financial Records Management
_______ Ten-Key Machines (by touch)
_______ Calculators
_______ Business Math
_______ Machine Transcription

COMMUNICATION ARTS/LANGUAGE SKILLS

DESCRIPTION

Since language is the vehicle of communication, learning to communicate effectively means learning to use the language effectively. It is not enough to have the words. Words must be shaped, combined, and manipulated into ideas. Success in the business field is largely determined by the ability to communicate essential facts and ideas clearly and concisely. By understanding the function of language, its structure and mechanics, a student is well on the way to realizing the power of language and how to make this power work.

This unit may be useful in preparing students for competing in FBLA/PBL, the Arizona State sanctioned co-curricular student organization. Competitive events: Business Communications, Office Procedures, Stenographer I, Stenographer II, Corresponding Secretary

OVERVIEW OF LEVELS

LEVEL I	LEVEL II	LEVEL III	LEVEL IV
Basic Language Skills Spelling Punctuation Grammar			

COMMUNICATION ARTS/LANGUAGE SKILLS - LEVEL I

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
CA/L-I-1	Given a test on basic language skills,	the student will complete the test	with 80 percent accuracy.

COMMUNICATION ARTS/LANGUAGE SKILLS - LEVEL I

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
CA/LS-I-1	Basic Language Skills Spelling Final Consonants Final Y Final E IE and EI Plurals Apostrophe Hyphen Abbreviations Capitalizations Prefixes/Suffixes Homonyms Frequently Misspelled Words Punctuation End Punctuation Comma Semicolon Parentheses Colon Quotation Mark Dash Ellipses Brackets Asterisk Underscore Numbers	CA/LS-I-1	Administer the Communication Skills Arts/Language Skills Criterion-Referenced Test as a Pre-Test. REFER TO: CA/LS, page 5 Particular areas of grammar, punctuation and capitalization may be tested by means of diagnostic and achievement tests given at intervals and at the end of the course. A comparison of the results of a pretest with the results of post-test will show the student's growth in that area. Administer the same test as a post-test. HINT: The teacher should develop a library of reference materials from which drills and remedial exercises can be drawn.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Basic Language Skills (Continued) Grammar Subject-verb Agreement Pronoun-antecedent Agreement Pronoun Case Misplaced/Dangling Modifiers Sentence Structure Parallel Structure Periodic Structure Unity and Variety Fused Sentences Fragments Comparative and Superlative Adjectives Confused Verbs; Tense and Mood Vocabulary		Encourage the student to develop an extensive vocabulary with emphasis on business and related terminology. A "Word a Day" activity can encourage students to learn business vocabulary. Place a business term on the board and give bonus points to the student who can define the word and use it in a sentence.

COMMUNICATION ARTS/LANGUAGE SKILLS CRITERION REFERENCED MEASUREMENT - LEVEL I

LANGUAGE PRETEST

DIRECTIONS: Consider carefully each of the 25 sentences that follow. Some are correct while others contain a mistake in spelling, punctuation, grammar or usage. If the sentence is incorrect, underline the error and write the correction in the Answer Column. The first two sentences are given as examples.

ANSWERS

0. The letters invited Mary and me to report for interviews. C

00. Mrs. Snyder asked the manager's advise before completing the questionnaire. advice

1. The president of the firm gave several examples to illustrate the principals under discussion. ______________

2. Within the next ten to twelve weeks, the personal manager will advertise for and employ a night watchman, a secretary, and a bookkeeper. ______________

3. They prepared these reports for you, use them to project next year's sales volume. ______________

4. Everybody in this company, including the secretaries and typists, is being asked to do their own thinking. ______________

5. He will enroll in the university next September and will take courses in accounting and management. ______________

6. The appointment for Joseph and her was made at Mrs. Hess's request. ______________

7. Is it true that he, as well as his brothers, are not eligible for the company's special discount? ______________

8. Their's is an impressive sales record! ______________

9. Please, Mrs. Cornwall, type this letter on my personal sationary, not on the company's letterhead. ______________

10. The manager ordered six dozen No. 2 pencils, eight reams of 20-pound, 25 percent rag content paper; and one dozen rulers. ______________

11. The boss became anxious when he heard about Frank not telephoning from Texas. ______________

12. Mr. Leroc, as well as his associates, is aware of the harmful effects of such employment practices. ______________

COMMUNICATION ARTS/LANGUAGE SKILLS CRITERION-REFERENCED TEST - LEVEL I

PUNCTUATION AND CAPITALIZATION

DIRECTIONS: In the following sentences, insert the necessary marks of punctuation. If a lower-case letter should be capitalized, write a large capital over the lower-case letter.

1. A competent secretary is proficient in grammar spelling and punctuation.
2. J. Richards Jr. transferred to his companys offices in Portland Oregon last year.
3. Thirty six of the employees received recognition for five years service with the firm.
4. The statement was furthermore a direct contradiction to the one he had made earlier.
5. Because of the economy the plant was forced to close consequently many employees were forced to apply for unemployment compensation.
6. The group touring the southwest will all drive buick cars and will meet on the north side of the high school to form their caravan.
7. Please note the following characteristics of this motor attractive appearance durable construction ease of operation and two year guarantee.
8. The executive while talking to the members of the Palmer country club became ill.
9. That quotation is from volume 6, chapter 2, page 8.

PUNCTUATION AND CAPITALIZATION

KEY

1. A competent secretary is proficient in grammar spelling and punctuation.
2. J. Richards Jr. transferred to his companys offices in Portland Oregon last year.
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9. That quotation is from volume 6, chapter 2, page 8.

COMMUNICATION ARTS/LANGUAGE SKILLS CRITERION-REFERENCED TEST - LEVEL I

SPELLING

DIRECTIONS: Each of the following 18 words is shown in its correct form and in one or two of its common misspellings. Underline the correct spelling of the word.

1. fimiliar, familar, familiar
2. maintenence, maintenance, maintainence
3. category, catagory
4. definate, definite, defnite
5. similer, simular, similar
6. recieve receive
7. quanities, quantities
8. opportunity, oppertunity
9. separate, seperate
10. reccommend, recommend, reccomend
11. personell, personnel, personnell
12. accommodate, accomodate, acommodate
13. privalige, priviledge, privilege
14. writing, writting
15. February, Febuary
16. truly, truely
17. convenence, convenience, convenance
18. apparent, apparant

SPELLING

KEY

1. fimiliar, familar, familiar
2. maintenence, maintenance, maintainence
3. category, catagory
4. definate, definite, defnite
5. similer, simular, similar
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13. privalige, priviledge, privilege
14. writing, writting
15. February, Febuary
16. truly, truely
17. convenence, convenience, convenance
18. apparent, apparant

COMMUNICATION ARTS/LANGUAGE SKILLS - CRITERION-REFERENCED TEST - LEVEL I

DIRECTIONS: Complete each of the following sentences by underscoring the correct word or words in parentheses.

1. The president and the vice-president sent in (his, their) estimates.
2. He is willing to buy new equipment (provided, providing) it is necessary.
3. It is (I, me) from whom he borrowed the (50, fifty) cents.
4. The (affect, effect) of the change will soon become evident.
5. The company directors (formally, formerly) announced their selection of the new plant (sight, site).
6. Neither the driver nor his assitant (was, were) to blame for the accident involving the man (who, whom), we were told, was seriously injured.
7. Detailed recommendations appear on page (eighteen, 18) of the act.
8. The package was addressed to Olive and (I, me).
9. The plant is not being operated at (it's, its) full capacity.
10. Every division and every office (has its, have their) own coffee machine.
11. Have you decided (who, whom) will get the prize?
12. Of the four reports, the one submitted by Vincent is the (better, best).
13. Can we depend upon (their, them) sending the machine without (our, us) reminding them?
14. Your answer to our (principal, principle) question caused us to reject your (advice, advise).
15. Can you advise us about a change that will (affect, effect) all (personal, personnel)?
16. (Who, Whom) do you think should be assigned to compose this kind of memo?
17. The three secretaries regulary correspond with (each other, one another).

KEY

1. The president and the vice-president sent in (his, *their*) estimates.
2. He is willing to buy new equipment (*provided*, providing) it is necessary.
3. It is (*I*, me) from whom he borrowed the (*50*, fifty) cents.
4. The (affect, *effect*) of the change will soon become evident.
5. The company directors (*formally*, formerly) announced their selection of the new plant (sight, *site*).
6. Neither the driver nor his assitant (*was*, were) to blame for the accident involving the man (*who*, whom), we were told, was seriously injured.
7. Detailed recommendations appear on page (eighteen, *18*) of the act.
8. The package was addressed to Olive and (I, *me*).
9. The plant is not being operated at (it's, *its*) full capacity.
10. Every division and every office (*has its*, have their) own coffee machine.
11. Have you decided (*who*, whom) will get the prize?
12. Of the four reports, the one submitted by Vincent is the (better, *best*).
13. Can we depend upon (*their*, them) sending the machine without (*our*, us) reminding them?
14. Your answer to our (*principal*, principle) question caused us to reject your (*advice*, advise).
15. Can you advise us about a change that will (*affect*, effect) all (personal, *personnel*)?
16. (*Who*, Whom) do you think should be assigned to compose this kind of memo?
17. The three secretaries regulary correspond with (each other, *one another*).

COMMUNICATION ARTS/LANGUAGE SKILLS - LEVEL I

DIRECTIONS: Consider carefully each of the 6 sentences that follow. Underline any word, word combination, punctuation, or abbreviation that would be unacceptable; then write the preferred business form in the space provided. If a sentence is acceptable for business communication as printed, place a C in the space.

1. The company launched a city wide advertising campaign to promote its product. ____________
2. We were uncertain about him performing his job competently. ____________
3. The fate of house bill 650-9 will be decided after today's vote. ____________
4. The executives' offices have wool carpeting, the secretaries' offices have nylon carpeting. ____________
5. Spanish-Americans, Blacks, and Indians are in demand on today's job market. ____________
6. The other applicant was as nervous as me. ____________

KEY

1. The company launched a city wide advertising campaign to promote its product. city-wide
2. We were uncertain about him performing his job competently. his
3. The fate of house bill 650-9 will be decided after today's vote. House Bill
4. The executives' offices have wool carpeting, the secretaries' offices have nylon carpeting. carpeting;
5. Spanish-Americans, Blacks,and Indians are in demand on today's job market. C
6. The other applicant was a nervous me. I

COMMUNICATION ARTS/LANGUAGE ARTS - CRITERION-REFERENCED MEASUREMENT - LEVEL I

CA/L-I-1 - LANGUAGE PRE-TEST

13. The original letter and the carbon copies were filed.

14. Five pages are the length of his report.

15. She was all together pleased with the raise she received at the end of the year.

16. Employees of the government in this State are prohibited by law from forming unions.

17. When most of the votes were counted the winner of the election was thought to be he.

18. She was selected to chair one of the important committees at the Ninth Annual Conference, but she was to busy to accept the appointment.

19. He gave alot of thought to his answer before he felt quite ready to reply.

20. She wanted; therefore, to accept his offer of employment and knew she would enjoy working as his aide.

21. The door was slammed so hard that it's window shattered.

22. If I were you, I would make sure that each of the applicants take the test.

23. That was Andrew not his twin brother.

24. She is very efficient; for example, she completed all of Mr. Jones's dictation and half of Mr. Levitt's before leaving for lunch.

25. Please schedule this appointment for 4:15 P. M. , and make certain that the english-speaking interpreter is also available at that time.

COMMUNICATION ARTS/LANGUAGE SKILLS CRITERION REFERENCED MEASUREMENT - LEVEL I

LANGUAGE PRE-TEST (Continued)

KEY

1. The president of the firm gave several examples to illustrate the principals under discussion.
2. Within the next ten to twelve weeks, the personal manager will advertise for and employ a night watchman, a secretary, and a bookkeeper.
3. They prepared these reports for you, use them to project next year's sales volume.
4. Everybody in this company, including the secretaries and typists, is being asked to do their own thinking.
5. He will enroll in the university next September and will take courses in accounting and management.
6. The appointment for Joseph and her was made at Mrs. Hess's request.
7. Is it true that he, as well as his brothers, are not eligible for the company's special discount?
8. Their's is an impressive sales record!
9. Please, Mrs. Cornwall, type this letter on my personal sationary, not on the company's letterhead.
10. The manager ordered six dozen No. 2 pencils, eight reams of 20-pound, 25 percent rag content paper; and one dozen rulers.
11. The boss became anxious when he heard about Frank not telephoning from Texas.
12. Mr. Leroc, as well as his associates, is aware of the harmful effects of such employment practices.

ANSWERS

1. principles
2. personnel
3. you;
4. his/her
5. C
6. C
7. is
8. theirs
9. stationery
10. pencils;
11. Frank's
12. effects

COMMUNICATION ARTS/LANGUAGE SKILLS CRITERION REFERENCED MEASUREMENT - LEVEL I

LANGUAGE PRE-TEST (Continued)

KEY

13.	The original letter and the carbon copies were filed.	13.	C
14.	Five pages are the length of his report.	14.	is
15.	She was all together pleased with the raise she received at the end of the year.	15.	altogether
16.	Employees of the government in this State are prohibited by law from forming unions.	16.	state
17.	When most of the votes were counted the winner of the election was thought to be he.	17.	counted,
18.	She was selected to chair one of the important committees at the Ninth Annual Conference, but she was to busy to accept the appointment.	18.	too
19.	He gave alot of thought to his answer before he felt quite ready to reply.	19.	a lot/a great deal
20.	She wanted; therefore, to accept his offer of employment and knew she would enjoy working as his aide.	20.	wanted
21.	The door was slammed so hard that it's window shattered.	21.	its
22.	If I were you, I would make sure that each of the applicants take the test.	22.	takes
23.	That was Andrew not his twin brother.	23.	Andrew,
24.	She is very efficient; for example, she completed all of Mr. Jones's dictation and half of Mr. Levitt's before leaving for lunch.	24.	C
25.	Please schedule this appointment for 4:15 P. M. , and make certain that the english-speaking interpreter is also available at that time.	25.	English

COMPETENCY PROFILE

for

COMMUNICATION ARTS/LANGUAGE SKILLS - LEVEL I

Student Name:______________________________

Start Date____________________

Completion Date____________________

(date/initial)

QUALIFIED	SCORE	NOT QUALIFIED

CA/L-I-1 Basic Language Skills

has passed a comprehensive language skills test

CERTIFICATE OF COMPETENCY AWARDED______________________________

Date Initials

COMMUNICATION ARTS/INTRODUCTION

DESCRIPTION

Business demands effective communicators. The success, even the survival, of a business depends on a staff that is well trained and competent in its use of communication skills. These skills save time, prevent costly errors, and promote the objectives of the enterprise. Employees unable to demonstrate competency in speaking, listening, reading, and writing are of limited value to an employer and will find their job opportunities just as limited. Higher-level, higher paying jobs go to those who have mastered the language and its mechanics and who can, with confidence, inform and influence others by means of effective communication. It is an art worth mastering.

COMMUNICATION - INTRODUCTION, SPEAKING, LISTENING, READING, WRITING, LANGUAGE SKILLS

Every educator in the business field, every business executuve know the importance of the communicative arts. The despair of the business sector is that competent use of the language appears to be a lost art. The demand is that something be done about it. It is essential that all business students in general and office education students in particular develop competency in the various communicating mediums: speaking, listening, reading, and writing. Until these skills are acquired, the student's education is not complete, nor is the student equipped to enter the business world. The responsibility is on the teacher; it is a heavy one. The satisfaction is in meeting the challenge.

COMMUNICATION LIBRARY

As early as possible and as funds permit, the teacher will want to place a variety of reference materials in the library. In the form of books, periodicals, government publications, and publications by business and industry, these materials should be both varied and comprehensive. Some, such as those published in pamphlet form by government and industry, can be obtained free or at minimal cost. Start small; add or revise often.

Business English texts usually include sections that deal with the elements of writing. Some texts also include diagnostic tests in such elements as punctuation, grammar/usage, and spelling. In addition to mechanics, most cover the content areas of organization and development as well as style, tone, and diction. The choice of adopting a text or selecting one to use only as a source of reference will depend on the teacher's goals and the needs of the students. Whatever the choice, the range of excellent books is quite broad.

INTEGRATION

The Communication Arts module has been divided into six segments: Introduction, Speaking, Listening, Reading, Writing, and Language Skills. It is, however, very difficult to teach any one segment without reference to the others. Activities in this module will aid students in achieving specific competencies and in successfully completing competencies in other modules.

DIAGNOSTIC TESTS AND RESULTS

The diagnostic test is an invaluable instructional tool. Whether administered by a teacher to an individual student or to an entire class, or whether administered on a broader basis by professionals brought into the school system, a well-designed diagnostic test can help direct the entire instructional process. By indicating a student's present level of development, it can form the basis for future instructional planning.

OUTLINE AND LEARNING ACTIVITIES AND TEACHING SUGGESTIONS

OUTLINE

Importance of Effective Communication in Business
- Aids in Career Advancement
- Results Increased Profits
- Necessary for Organization
- Necessary to Meet the Demands of New Technology

Ethical and Moral Codes
- Personal and Professional Conduct
- Business and Community Relationships
- Legal Aspects

Goals of Effective Business Communications
- Convey Information
- Assure Understanding
- Get Action
- Persuade
- Solve Problems

Means of Communication
- Speaking
- Listening
- Reading
- Writing
- Non-Verbal or Body Language

LEARNING ACTIVITIES AND TEACHING SUGGESTIONS

Present a lecture that will lead to class discussion on the importance of effective business communications. Correlate information to the text used by the class or available for reference.

Students prepare a definition of "communications" through class discussions. (Such as, "Communication involves the effective transfer of a thought or idea from one person to another person or persons." or "One of the most used words in modern day business vocabulary is communication. Communication is a factor necessary to the successful operation of any form of organized activity.")

Audio-visual media can be used to aid developing importance of communications.

Show films tracing the developments in communications.

Dartnell-like reports and surveys can be used for reference sources.

Demonstrate through the use of overhead transparencies how to analyze the differences and similarities of several ethical and moral codes that refer to communications. Identify the items in the codes that refer to communications. Organizations could be International Word Processing Association, Business and Professional Women, Chamber of Commerce, FBLA/PBL or others.

Small groups can solve different case problems. Have the groups share the solutions with the rest of the class.

Draw examples from a business law text of the legal aspects of communications.

Topics for study and discussion could be:

1. Integrety in writing and honest consideration for the reader.
2. Conflicts of the rights of freedom of speech and the individuals right not to be libeled.

COMMUNICATION ARTS/INTRODUCTION

OUTLINE AND LEARNING ACTIVITIES AND TEACHING SUGGESTIONS

- Determiners of the Need for Communication
  - Who
  - What
  - When
  - Where
  - Why (purpose and approach
  - How

- Barriers to Communication
  - Culture
  - Language
  - Meaning
  - Words
  - Non-verbal or body language

- Techniques of Communication
  - Elements Necessary
    - Information
    - Senders
    - Receivers
- Responsibilities of Sender
  - Know Self
    - Technical Abilities
      - Language Skills
      - Media Development Skills
    - Psychological Reactions
      - Aural
      - Visual
  - Know facts of Message
    - Short/Long Run Purpose
    - Details of Subject Matter
    - Effect Desired
      - Informational
      - Request for Action

3. How statutes in various states differ and laws change on
   - a. defamation
   - b. invasion of privacy
   - c. fraud
   - d. pertinent laws regarding employment, credit collections
   - e. other areas of caution

Give each student a copy of the Media/Document Chart for permanent reference. The chart is a compilation of communication media most often found in today's businesses. It can be a basic reference for many activities throughout the Communication Arts module as well as the entire Curriculum Guide Teacher can identify items most commonly found in an office.

REFER TO: WORD/INFORMATION PROCESSING, p. 44.

Collect and display samples of the items found on the Media/Document Chart.

Have resource person discuss job interviews, employment application forms, grooming for business, etc., regarding employment requirements. Obtain feedback by means of oral and/or written reports.

Have the students investigate the bulletin board of a business; analyze what they discover. Consider the kinds of materials displayed and the effect of the board.

Explain how the items on the Media/Document Chart can be communicated in more than one way. Discuss the most effective way.

Discuss the importance of the four means of communications. Have students illustrate how each of the four means can be applied to an FBLA/PBL or other event.

Have the student recognize and demonstrate body language as an aspect of communication.

COMMUNICATION ARTS/INTRODUCTION

OUTLINE AND LEARNING ACTIVITIES AND TEACHING SUGGESTIONS

Techniques of Communication
(continued)

- Know Best Media Channels
  - Written
  - Nonverbal
  - Oral
  - Electronic
- Advantages/Disadvantages of Choices
- Special Requirement of Media Chosen
- Know Receiver
  - Response to Sender
  - Personal Knowledge
  - Psychological/Sociological Knowledge
- Develop Message
  - Purpose
  - Reader's Needs
  - Information Available
  - Company Policy
  - Timing
- Approach
  - Logical
  - Emotional
    - Fear
    - Self-Indulgence
    - Acquisitiveness
    - Self-Preservation
    - Curiosity
- Strategy
  - Good News
  - Persuasion
  - Bad News

Give short frequent drills on the six determiners as a list. Stress that they are basic to all effective communication.

Through class discussion, create situations in which the various levels of communication channels are illustrated.

Example: Vertical communications, both upwards and downwards
Horizontal communications with peers

REFER TO: BUSINESS ORGANIZATION AND MANAGEMENT, p. 24, 29.

Build letter, memo and phone call situations with students which will illustrate the use of the six determiners. A person-to-person situation is easiest to begin with.

Build some situations with students in which one or more of the six determiners are missing. Have students identify the missing deteminers.

Have students prepare a news release for FBLA/PBL. Verify that all the determiners are present. Illustrate how a student could conduct a meeting (committee, department, regular organization's business meeting), take minutes and prepare a report.

Develop bulletin board displays.

Demonstrate the pitfalls in communications and show that every facet of human activity involves communications.

In pantomime, try to express before the class some mannerisms of walk, hand movements, or facial expressions that distract and impede communications. Was the class able to identify the communication barrier you were tying to convey?

Divide class into four groups. Assign each group one of the barriers to communication and ask that they present several situations in which they have created that barrier.

Divide the class into teams of two. Practice identifying the barriers as dircted in the preceding activity.

COMMUNICATION ARTS/INTRODUCTION

OUTLINE AND LEARNING ACTIVITES AND TEACHING SUGGESTIONS

Techniques of Communication (Continued)
- Responsibilities of Receiver
  - Know Self
    - Technical Abilities
    - Psychological Reaction
- Analyze Message
  - Purpose
  - Relevance
  - Details
    - Accurate
    - Complete
- Recognize Media
  - Appropriateness
  - Utilization
    - Accurate
    - Adequate
- Know Sender
  - Purpose
  - Personal Knowldege
- Commitment to Receive
  - Choice of Stimuli
    - Conscious/Unconscious
    - Aural/Visual
  - Focus Attention
  - Eliminate Extraneous Stimuli
- Receiver Advantages
  - Increased Knowledge
  - Understanding
  - Critical Appraisal
  - Empathy
  - New Enjoyment

Drill on the three elements necessary for communication: sender, information, receiver.

The student should develop an awareness of words and how to express throughts. They should be urged to develop a continuing habit of vocabulary enrichment by looking for new words in their daily reading and listening.

A thesaurus and other reference books should be consulted.

The dictionary should be used consistently and efficiently.

REFER TO: REFERENCE SOURCES, page

Talk about the emergence of electronic communication. Refer to Word Information Processing, Data Information Processing, Mail Processing and Telephone Techniques for specific references to equipment.

Through class discussion of the case problems, the teacher can stress many of the important concepts of the communication process. Case problems may be used to present concepts of the responsibilities of the sender and the receiver.

Sample Case: After three of your school friends returned from a football game (which your team lost, 28 to 31), you asked each individual for impressions about game highlights. Susan commented in detail on the excellent defensive work and on "your" team members who made the touchdowns. Ron stressed the fumbling, incomplete passes, the poor stadium seat he had, and the cold weather. Nick, whose favorite sport is not football, enjoyed seeing the "cute" costumes of the cheerleaders, their unusual baton twirling, and the marching bands. Then Scott, who stayed home, boasted that he saw everything on TV. Did he really? How do these different "reports" relate to some concepts of the communication process?

Sample Case: A superintendent (Jane) said to Jim, a maintenance worker, "Plant 2 is having trouble with its automatic control. Whatever the trouble is, go out there and get rid of it." The next day, after receiving angry complaints from Plant 2, Jane berated Tim for yanking out completely and discarding the entire control unit and installing a new one, even though Plant 2 had purchased the original unit only five months before. The company had a new, rigid cost-cutting program with rules to repair, rather than replace, all salvageable equipment whenever possible. But Jane had failed to inform Tim of that rule. Thus Tim thought that because the control unit was causing the trouble, that's what he should "get rid of." Jane had wrongly assumed that her instructions were clear but Tim's understanding was entirely different from Jane's.

Considering the responsibilities of the sender and the receiver, discuss with the class the responsibility of the sender to ask mentally whether the words and sentence structure used clearly conveyed the intended meaning to the receiver. What that person thinks the message is will be of crucial importance regardless of what the sender thinks.

This is a good time to discuss the importance of asking questions to determine the sender's intended meaning before taking action.

Illustrate how "taking action" or "feedback" is a vital link in the communication process. Example: Not knowing a letter requesting an appointment is not received. What could happen?

Show how receiver feedback becomes the first step in a new communication series.

COMMUNICATION ARTS/LISTENING

DESCRIPTION

Listening occupies more time than any other communication activity. Many workers in business and industry rely on listening skills in order to carry out their daily assignments. Every worker receives much information and many instructions orally from co-workers, supervisors, and customers. Failure in listening results in errors and misunderstandings which are costly in terms of time, money and goodwill.

This unit may be useful in preparing students for competing in FBLA/PBL, the Arizona State sanctioned co-curricular student organization. Competitive events: Job Interview, Mr. and Ms. FBLA, and Mr. and Ms. Future Business Executive.

OVERVIEW OF LEVELS

LEVEL I	LEVEL II	LEVEL III	LEVEL IV
Listening in Business Importance Purposes Techniques	Reinforcing Listening Skills		

COMMUNICATION ARTS/LISTENING - LEVEL I

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
CA/L-I-1	Given an objective test covering the importance of listening	the student will complete the test using class notes	with 80 percent accuracy.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
CA/L-I-1	Listening in Business Need for Effective Listening	CA/L-I-1	Choose a business position that you would someday like to hold. In a paragraph, describe some of the listening activities that would be required of you in order to carry out your job duties. Stress that listening as a skill is not learned automatically, yet we are more dependent on it to obtain information than any other. HINT: Hearing--physical ability to receive sound Listening--a learned skill developed through practice
	Purposes of Listening Obtain Facts Determine Accuracy Understand Instructions Pleasure		Divide the class into groups of five or six. The students are to assume other names and, one at a time, introduce themselves to the others. After all introductions are made, have each student try to introduce all others. If they miss more than one, they are not listening. REFER TO: The GUIDE FOR INTEGRATING FBLA INTO THE CLASSROOM, pages 2.22 to 2.25 for listening activities related to FBLA/PBL. To emphasize careful listening, bring a record of a popular song to class. Play it and have students identify the number of voices, the words and their meanings, and the various kinds of instruments being played. Discuss careful vs casual listening.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Listening in Business (Continued) Techniques of Listening Determine Purpose Mind Set Acknowledge Barriers Accept Responsibility Critical Evaluation Note Major Points Recognize Details Anticipate What is Coming Rephrase and Review Detect Bias and Determine Motives Take Notes		Direct students to compare several ways to evaluate critically while listening. Checklists are available in many texts. Discuss the technique of listening with an open mind. Present some current events items in a controversial manner. Arrange class or large group in a circle and discuss some topic such as communications. During the group discussion have student watch for the listening techniques used by an assigned partner. A simple checklist of possible reactions can be used. More than one reaction may occur during any given discussion period. Example list could be: 1. looks happy--pleased 2. looks upset--angry 3. listens quietly--doesn't join in 4. puzzled--doesn't understand 5. looks bored--disinterested, asleep 6. participates--contributes Encourage students to begin taking good notes by having them compare notes for completeness and accuracy. Allow students to use notes for the competency test.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Listening in Business (Continued)		
	Development of Personal Listening Improvement Program		Invite the school's hearing specialist to speak on listening (and hearing) for educational, professional, and personal growth. Have students take notes on the important concepts presented. Have class discussion based on notes taken by students. Obtain results of previously administered hearing tests (those on file with the school nurse should be available). Because of the importance of hearing in the office, encourage medical help for any physical weaknesses that may be discovered. REFER TO: TELEPHONE TECHNIQUES, P. 3, 4, 5, 9 for additional exercises on listening and note taking.

COMMUNICATION ARTS/LISTENING CRITERION-REFERENCED TEST

LEVEL I

DIRECTIONS: Fill in the blanks with the correct responses. YOU MAY USE NOTES TAKEN IN CLASS.

1. List the four purposes of listening.

   a.
   b.
   c.
   d.

2. Which two techniques of listening are missing?

   a. Determine purpose
   b. Acknowledge barriers
   c. Accept responsibility
   d.
   e.

3. __________(true or false) One way to assure critical evaluation while listening is to take good notes.

4. Are the following barriers to listening?
   _____(yes or no) Lawnmower outside your office.
   _____(yes or no) Phone caller speaks only French.
   _____(yes or no) A speaker with a well-modulated voice.

5. The skill of listening is not learned.
   __________(true or false)

Use the following terms to complete the sentences:

retention, empathy, bias, hostility, involvement, discretion, listening, hearing

6. His ____________with the story was so intense that he could not turn off the TV.

7. ____________ is the physical ability to receive sound, while ____________ is a learned skill developed through practice.

8. Her __________ toward the speaker prevented her from listening to the speech.

KEY . . .

1. a. Obtain facts
   b. Determine accuracy
   c. Understand Instructions
   d. Pleasure
2. d. Mind set
   e. Critical evaluation
3. True
4. Yes, yes, no
5. False
6. Involvement
7. Hearing, listening
8. Hostility

COMPETENCY PROFILE

for

COMMUNICATION ARTS/LISTENING - LEVEL I

Student Name ______________________________

Start Date ____________________

Completion Date ____________________

(date/initial)

QUALIFIED	NOT QUALIFIED

CA/L-I-1 Listening in Business
Importance
Purpose
Techniques

CERTIFICATE OF COMPETENCY AWARDED ______________________________
Date Initials

COMMUNICATION ARTS/LISTENING - LEVEL II
COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
CA/L-II-1	Given oral directions for accomplishing a given task	the student will follow the directions	with 100 percent accuracy.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
CA/L-II-1	Reinforcing Listening Skills Listen for Understanding Listen with Openmindedness Listen Actively Take Notes Interact Mentally Listen Critically	CA/L-II-1	Assign students to prepare skits to show effective listening (in a job interview). Send student teams to a specifice place (shopping mall, bank, etc.) to listen to all the sounds they can hear in 15 minutes or less. Discuss what they heard with the class. Ask students to be very quiet and listen to the sounds in the classroom. Explain that all the sounds they hear have been there, but they were not listening to them. Discuss the difference between hearing and listening. Students respond to a set of directions that are stated but not repeated, such things as where to put names on paper, or to write something each time a certain sound is heard. In addition to hearing what is being said, students are listening for other cues. Student accurately follows directions with a time limit. Give students a worksheet and have them respond to oral directions at an increasingly faster rate. Provide students with a street map. Ask them to prepare a set of instructions on how to travel from one place to another (school to airport). Present them orally; have class evaluate by critical listening to determine if they would have arrived at the correct destination. Review taking notes and asking pertinent questions. Select any activity that requires listening and asking questions in order to complete the activity. Direct students to draw/complete a design by following oral instructions.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Reinforcing Listening Skills (Continued)		Develop a short paragraph in which facts and opinions are presented. Have students pick out key words that distinguish facts from opinions. HINT: Facts--statements that can be proven. Opinions--what a person believes or thinks, but may not be a fact. Oral directions can be given for the completion of a task. Only those stated as "facts" are to be followed. Students unable to differentiate between "facts" and "opinions" will follow the incorrecly identified instructions.

COMMUNICATIONS ARTS/LISTENING CRITERION-REFERENCED TEST

LEVEL II

Teacher script for oral or taped test instructions. Try to keep your timing between instructions even.

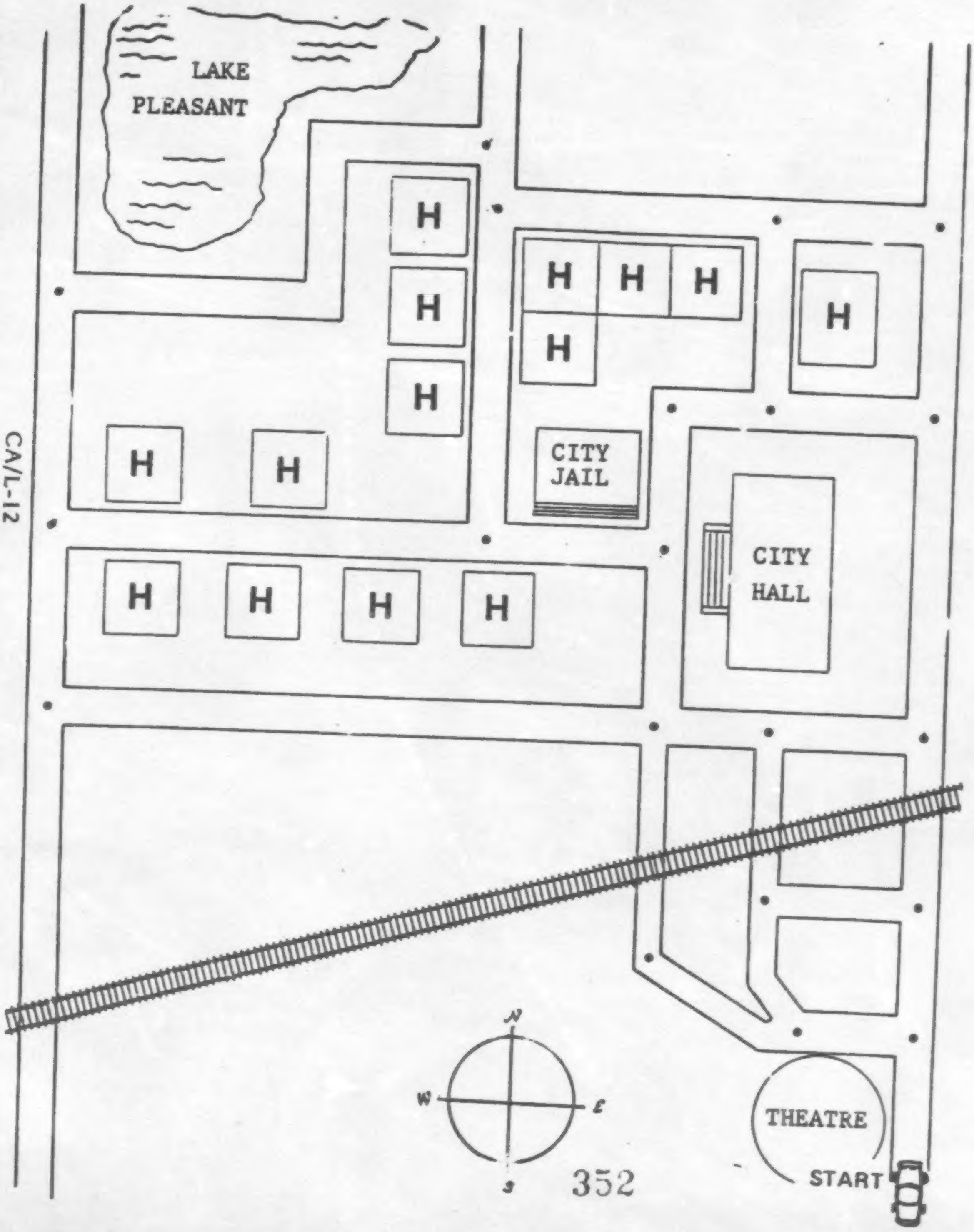
"As I give you directions, follow them by tracing with a pencil or pen your trip on the map. You will be given each instruction only one time. You may not ask any questions. Have your pen on your car by the theater at the lower right hand corner of your map.

1. Drive north and turn left at the intersection before the railroad tracks.
2. Drive west for first intersection, turn right.
3. Drive north to dead end and turn left.
4. Turn right at first intersection and drive north past the city hall and then turn right.
5. Turn left at first intersection and drive north to dead end.
6. Turn west and drive to the intersection.
7. Go north to the first intersection, then west on the road that goes around Lake Pleasant.
8. At the south-west corner of the lake, turn south.
9. Turn east at the next intersection.
10. Your destination is the second house on the right. Put a big X mark on this house."

Student Name________________________________Date__________Score__________

DIRECTIONS: You are to trace with a pen or pencil the route you will take from the theater to your destination. Your teacher will dictate the directions only once, you may not ask questions. Pay close attention--Listen Well!--or you may miss the party.

CA/L-12



COMPETENCY PROFILE

for

COMMUNICATION ARTS/LISTENING - LEVEL II

Student Name____

Start Date________________________

Completion Date____________________

(date/initial)

QUALIFIED	NOT QUALIFIED

CA/L-II-1 Reinforcing Listening Skills
Following Oral Directions

CERTIFICATE OF COMPETENCY AWARDED____
Date Initials

COMMUNICATION ARTS/READING

DESCRIPTION

All successful persons in business spend a good portion of their working day reading, and yet the ability to read and comprehend is taken for granted. No matter what business position one hopes to hold, reading will play an important part in one's occupational life. A survey made by the American Management Society indicates that the higher a person's position in the business world, the more the person reads. The importance of reading skills cannot be overemphasized.

This unit may be useful in preparing students for competing in FBLA/PBL, the Arizona State sanctioned co-curricular student organization. Competitive events: Job Interview, Extemporaneous Speaking, Public Speaking.

OVERVIEW OF LEVELS

LEVEL I	LEVEL II	LEVEL III	LEVEL IV
Reading in Business	Reinforcing Reading Skills		
Importance	Critical Reading		
Personal Reading Improvement Program			

COMMUNICATION ARTS/READING - LEVEL I

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
CA/R-I-1	Given a letter and a list of items to be checked,	the student will read the information and answer specific questions	with 80 percent accuracy.

COMMUNICATION ARTS/READING - LEVEL I

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
CA/R-I-1	Reading in Business Need for Effective Reading Educational Growth Professional Development Personal Pleasure Forms of Communication Used Reading and Other Communication Arts Reading and Listening Reading and Speaking Reading and Writing	CA/R-I-1	Present a lecture that will lead to class discussion on the importance of "The Importance of Reading in Business." Correlate information to the text used by the class or available for reference. Present a business situation; have students discuss what reading would be necessary and for what purposes. For variety, have students write a business situation that would require the person involved to read for a specific purpose. Assign students to collect examples illustrating the various purposes of reading. Conduct a class discussion: How reading improves one's speaking, writing and listening abilities. List major points on chalkboard. REFER TO: GUIDE FOR INTEGRATING FBLA INTO THE CLASSROOM publication, pages 2.26 to 2.31 for reading activities related to FBLA/PBL.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Reading in Business (Continued) Purposes of Reading Specific Information Understanding/Background Instructions/Directions Copying/Checking Pleasure		Show Dartnell-like surveys that indicate the amount of time a typical businessperson spends reading on the job. List the five purposes of reading on the board. Select paragraphs that illustrate purposes of reading. Have students read paragraphs and identify the specific purpose of each paragraph. For variety, have students work with a partner. Have each read a new paragraph; compare purposes. This could lead to a reading log. Students may keep a reading log by preparing a chart listing the five purposes of reading. As materials are read, the student places a check mark under the category on the chart. A self-assessment may follow this activity. This can indicate how much reading is done for pleasure, etc. Assign students to write down words of which they are not absolutely sure. Look up the words; memorize them--including spelling, pronunciation, definition, and use. Introduce students to the idea of building a library of good paperback books. HINT: Proofreading is a form of checking. REFER TO: WORD/INFORMATION PROCESSING, page 27 TYPING, pages 9 and 16. In order to read for specific information, students must pay attention to details. Have them find all the f's in the following sentence: Fantastic fires cleared the forest of many of the finest fir trees that could be found in the northern part of California.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Reading in Business		A BIRD IN THE THE HAND A second proofreader's activity: Give to each student a copy of the triangle (a chalkboard copy works). See if there is anything wrong with the triangle. Survey class to determine the extent to which students have had experiences in reading for comprehension. If necessary, review or introduce reading for comprehension: Getting Ready. "Preread" the material by surveying the title, table of contents, chapter heading, main headings, and introductory comments. Write down questions you anticipate finding answers for in the message. Searching for Main Ideas and Details. Make sure that you understand the vocabulary being used. Look for topic sentences and key paragraphs and try to discover the organizational pattern of the material. Analyzing and Interpreting. Pay special attention to the author's principal statements. Are they facts, inferences, or value judgements? Do you agree or disagree with the author? Is the author a recognized, unbiased authority? Is the research sound, including sufficient facts to support generalizations? Organizing and Remembering. After you've read the entire message, can you recall the major points in their proper order? If the message is important enough, you should take notes, either in brief outline form or as a quick summary.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Reading in Business (continued) Development of Personal Reading Improvement Program		Invite school's reading specialist to speak about reading for educational, professional, and personal growth. Ask students to take notes on the important concepts presented. A class discussion based on notes taken by students should follow. Obtain results of previously administered reading tests (those on file with the school for the mandated reading programs). Work with students to prepare an individual program for improvement of weak reading skills. Design the evaluation form to allow for periodic evaluation throughout the year.

COMMUNICATION ARTS/READING - CRITERION-REFERENCED TEST - LEVEL I

CA/R-I-1 - READING - PART I
TIMED TEST - TIME ALLOTTED - 10 MINUTES TOTAL FOR PARTS I AND II

DIRECTIONS: Carefully read the following letter. You may mark on the copy or make notes to help you identify important information. After you have read the letter, use this sheet to help answer the questions on the following page.

Mr. Richard Blake, Chairman
Business Education Department
Ellsworth Community College
Hastings, CO 81041

Dear Mr. Blake:

Two members of our organization attended the National Business Educator's annual convention in Little Rock last November 22 and heard you give the keynote address. They have recommended you so highly that we would like to ask you to speak for our dinner meeting on Friday, June 22. We will meet in the Stafford Room of the Billings Hotel at 6:00 p.m. Approximately 120 of our members will attend.

Could you give the same speech, "Ethics with Enthusiasm," that you gave at the Little Rock convention? Our representatives felt that the content of your ethics speech would be most interesting to our group since most of us are relatively new to the business community and are still in the process of laying the ethical foundations for our own business practices. Your delivery, our representatives tell us, is lively and humorous--again, especially appropriate for our young group.

Our organization will pay your expenses and give you an honorarium of $150. I will be happy to reserve a room for you at the Billings Hotel, our newest and largest, for the night of June 22.

Please let me know as soon as you can whether you can accept our invitation to speak to our group.

Sincerely yours,

James Fisk, Chairman
Business Associates, Inc.

COMMUNICATION ARTS/READING - CRITERION-REFERENCED TEST - LEVEL I

CA/R-I-1 - READING (continued)

DIRECTIONS: After you have read the letter, answer these questions. If necessary, you may refer to the letter to find the correct answer.

1. State the purpose of the letter.

2. What reason(s) does the letter give for specifically wanting this particular speech?

3. What is Mr. Blake's occupation? Title?

   a.

   b.

4. How did Mr. Fisk become familiar with Mr. Blake's speech?

5. List the specifics of the speaking engagement (be specific and complete):

   a. Occasion: ________________________________
   ____

   b. Location: ________________________________
   ____

   c. Time: ________________________________
   ____

   d. Attendance: ________________________________
   ____

6. What is Mr. Fisk's title?

7. What arrangements will be made for Mr. Blake?

   a. Remuneration: ________________________________

   b. Accommodations: ________________________________
   ____

KEY:

1. To request that Mr. Blake speak for Business Assoc., Inc.

2. The content would be interesting to this particular group.
   The humorous delivery would appeal to this group.
   The speaker was highly recommended.

3. Teacher
   Chairman of Business Education Department.

4. Two members of Business Association, Inc. heard Mr. Blake speak and told Mr. Fisk about the speech.

CA/R-I-1 - READING (continued)

5. a. Occasion: Dinner meeting of the Business Association, Inc.

   b. Location: Stafford Room, Billings Hotel, Hastings, CO.

   c. Time: Friday, June 22, 6:00 p.m.

   d. Attendance: Approximately 120 members of Business Association, Inc.

6. Chairman, Business Association, Inc.

7. Remuneration: Expenses plus $150

   Accommodations: A room for the night of June 22 at the Billings Hotel.

COMMUNICATION ARTS/READING - CRITERION-REFERENCED TEST -LEVEL I

CA/R-I-1 - READING (continued)

PART II: ACCURACY

DIRECTIONS: Compare the items given on each line. Write C (for correct) in the Answers column if the items in both columns match in every respect; if not, write W (for Wrong).

			ANSWERS
1.	Telephone Phoenix, 1869	Telephone Phoenix, 1896	_____
2.	Webster Sports Exchange	Webster's Sports Exchange	_____
3.	Action Bros., Co., Inc.	Action Bros., C., Inc.	_____
4.	2309 Lincoln St.	2309 Lincoln Ave.	_____
5.	McPhearson Lodge No. 305	McPhearson Lodge 305	_____
6.	Goff and Finkel	Goff & Finkel	_____

GROUP B

DIRECTONS: Count the number of identical pairs of names in each group and write the number of such pairs in the Answers column at the right. Item 0 is given as an example.

ANSWERS

0. Trade Executives Inc.—Trade Executives
Wm. J. Beckman—Wm. J. Beckman
J. B. Oppen—B. J. Oppen
Kathy Owens—Cathy Owens 1

7. Giovanni Amatti—Giovanni Omatti
R. Orchanski—R.O. Orchanski
R. P. Shaheen—R. P. Shahien
Alice P. Alperin—Alice P. Alpern _____

8. Francis Oppold—Frances Oppold
Dudley Zubold—Dudley Zubald
J. F. Lundstrum—J. F. Lindstrum
Janet Siebrandt—Janet Siebrandt _____

9. Vernon Dvorak—Vernon Dworak
Anne Beard-Ann Beard
Trudy Jamieson—Trudy Jamieson
A. R. Souretti—A. R. Souretti _____

ANSWERS

10. Agnes Lichter—Agnes Litcher
Carl C. Rouche—Carl C. Rouche
Quick Serve Co.—Quick Serve Corp.
D.I. Davidson—D.I. Davidson _____

11. Diane Alexander—Diane Alexsandro
Ainsa Serge—Ainsa Sergo
Jonathan Seidel—Jonathan Seidle
Childe Oil Inc.—Childe Oil Co. _____

12. Hugh Soulages—Hugh Soulages
L. B. Solper—L. B. Solpen
J. Wm. Slatin—J. Wm. Slatin
Ray B. Sigafoos—Ray Sigafoos _____

COMMUNICATION ARTS/READING - CRITERION-REFERENCED TEST - LEVEL I

CA-I-1 - READING (continued)

DIRECTIONS: Count the number of idenfical pairs of numbers in each group and write the number of such pairs in the Answers column at the far right. Item 0 is given as an example. Check as many as you can before time is called.

ANSWERS

0. 9927382----9927382
15672839----15672839
3678892----3678902
87263543----87263543
5572867----5572867
4

1. 25----25
492----429
67830----67833
7892451----7982451
4762----4762
____

2. 82134621----82134612
23----32
725634----725634
678932187----679832187
4379----4379
____

3. 2600106----2601006
89062----89026
72316777----72316777
729000927----729000927
34--34
____

4. 642004260----642040260
87625401030----87625401030
97----97
86009999----86009990
6028431113----6028431131
____

ANSWERS

5. 92176589360----92176589360
1557892341----1557892341
6947600110----6947600100
73482----73482
111----110
____

6. 16547234----16547234
489326----498236
37465----37564
9100760----9010760
5742----5472
____

7. 55567341----55576431
96432540----96432540
154230----152430
677----677
376598----367589
____

8. 63210597----62310597
843262----843262
4634----4634
89191181----98191181
764398----746398
____

9. 674321----674312
84627143----84627143
43----43
4612----4612
3729410----3279410
____

COMMUNICATION ARTS/READING - CRITERION-REFERENCED TEST - LEVEL I

KEY

GROUP A

1.	W	4.	W
2.	W	5.	W
3.	W	6.	W

GROUP B

7.	0	10.	2
8.	1	11.	0
9.	2	12.	2

GROUP C

1.	2	5.	3
2.	2	6.	1
3.	3	7.	2
4.	2	8.	2
		9.	3

COMPETENCY PROFILE

for

COMMUNICATION ARTS/READING - LEVEL I

Student Name:____________________________

Start Date____________________

Completion Date____________________

(date/initial)

		QUALIFIED	SCORE	NOT QUALIFIED
CA/R-I-1	Importance of Reading in Business			
	Important Details			
	Specific Information			
	Accuracy			

CERTIFICATE OF COMPETENCY AWARDED____________________________

Date Initials

COMMUNICATION ARTS/READING - LEVEL II

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
CA/R-II-1	Given a list of unarranged, related sentences	the student will read and arrange sentences in sequential order	with 100 percent accuracy.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
CA/R-II-1	Reinforcing Reading Skills Eyes Environment Speed and Rate Accuracy Comprehension Skim Scan Preview Read Actively Make Notes Reread Review	CA/R-II-1	Ask students to read paragraphs that present two or more points. Students should write down or orally present points from their notes. check for accuracy. Assign students to read paragraphs that present points/concepts in order of importance and write or orally present these points in order. Instruct students to read disarrayed sentences within a paragraph and write , type, or list sentences in order. Assign students to collect articles that present or show instructions in steps. Ask students to read from texts and professional literature for mastery of three related but essential separate skills: speed, accuracy and comprehension. HINT: Speed is determined by the number of words that can be read a minute. This aspect of reading is the easiest to measure. Reading accuracy is determined by how correctly the contents of the message can be perceived, and comprehension is measured by how well the message is understood. (Accuracy and comprehension are easily confused, but they are actually separate skills.) Scanning is looking quickly through material to find specific points or answer specific questions. Skimming is looking quickly at the whole message to see what is there. Reading rates faster than 400 wpm is scanning or skimming.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
CA/R-II-1	Reinforcing Reading Skills (continued)	CA/R-II-1	Encourage students to strive for a skimming rate of about 2,000 words a minute, with a comprehension level of about 80 percent.

Reading for Speed. A newsweekly is probably the most convenient material to use for self-help in improving speed in reading. Have students choose an article. Read it quickly (skim); time the reading (use a stopwatch if one is available, but absolute exactness isn't essential).

Instruct students to follow these steps to read/skim quickly:

1. Pay close attention to headings, the first paragraph, and the last paragraph.
2. Look for main ideas. The topic sentence of a paragraph is often the first sentence of the paragraph.
3. Look for names of people, places, events, and things.
4. Ask the five "W" questions--who, what, when, why, and where. If something is missed, don't worry about it. Forge ahead.
5. When finished skimming, note the time it took to skim the article. Write down everything remembered about the article.

Estimate the number of words in the article by counting the words in five lines, dividing that total by five, and multiplying that answer by the number of lines in the whole article. After calculating the number of words in the article, divide that figure by the number of minutes it took to read the article.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
CA/R-II-1	Reinforcing Reading Skills (Continued)		Reading for Accuracy. Go back and reread the article carefully. List the specific facts in the article. Comparing the original list with the list prepared from the article will reveal accuracy. Reading for Comprehension. Add the number of correct facts in the original list (the central ideas must be substantially correct, but it is okay to count two "half-right" facts as one correct one). Then divide by the total number of facts in the article. Your answer will be a percentage that indicates your level of comprehension. Provide reading materials for the class that illustrate the importance of reading in different ways. For example a newspaper for skimming for current events; a business report for a new product; textual materials for other units of study. HINT: Watch for. . . Vocalization--moving lips or by reading almost aloud. Have the student test for vocalization by placing fingers of one hand lightly over lips while reading. If a tendency toward lip movement is detected, make a conscious effort to read without vocalizing. Keep fingers over lips as a constant reminder. Subvocalization--forming of words with the vocal cords without moving the lips. A student may test for this tendency by placing fingers lightly on the larynx (Adam's apple) and checking for movement.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Reinforcing Reading Skills (Continued) Critical Reading Abstracting Articles Accumulating Information Files Organizing Materials for Statistical Reports, Charts and Graphs Publicity Speeches and Reports		Provide abstracts of articles for students to study. If possible, provide the article being abstracted. Have students develop a sample format for an abstract. Provide articles in various professional-level publications for students to abstract. The first try could be a team approach. For subject matter draw from other modules. Instruct the students to read a paragraph from various sources (newspaper, texts, professional magazines) then write in one sentence the principal thought of the writer. Assign students to read paragraphs that have more than one point presented and write points they have determined; check for accuracy. From a current newspaper, clip an editorial and ask students to write a brief summary of the principal points made in the editorial. As students learn to read critically, abstracts and summaries may be accumulated for later use. The accumulation of information can be in various forms: cards, notebooks, folders, etc. A comparison of similar books, such as texts, manuals, references, can be made and a report can be prepared and presented by developing statistical reports, charts and graphs, or oral presentations. HINT: The reader's understanding of written communication determines whether or not the writing is effective. The reader's understanding is often affected by the reading level of the material.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS

Reinforcing Reading Skills (Continued)

Critical Reading

Fog Index

Robert Gunning developed the FOG INDEX to determine the readability level of written material. The following steps are involved in using this index.

1. Count the number of words in a group of sentences. Then divide the total number of words by the number of sentences. This gives the average length of the passage.
2. Count the number of words of three syllables or more per 100 words. Do not counts words that (a) are capitalized, (b) have combinations of short words such as "bookeeper" and "butterfly," or verb forms made into three syllables by adding "ed" or "es" (such as "created" or "trespasses"). This give you the percentage of difficult words in the passage.
3. Add the average sentence length to the percentage of hard words. Multiply this total by 0.4. This answer corresponds to the number of years of education needed to understand the piece of writing easily.

Some examples of the Fog Index for different magazines and grade levels follows:

FOG INDEX	READING BY GRADE LEVEL	PUBLICATION
6	Sixth-grade level	Comic Books
7	Seventh-grade level	People, TV Guide
8	Eight-grade level	Ladies' Home Jnl.
9	High School Freshman	Better Homes and Gardens
10	High School Sophomore	Reader's Digest
11	High School Junior	Time, Newsweek
12	High School Senior	Atlantic, Harper's

CA/R-II-1

DIRECTIONS: Number the sentences in sequential order to represent Josephine's day as it would have occurred.

_______ After the interview Josephine thanked Mr. Able for his time.

_______ She dressed in a nice navy blue dress with plain shoes.

_______ Miss Jones, the receptionist, asked her to fill out the application form.

_______ She took the elevator up to the tenth floor and went in the office.

_______ Mr. Able called Josephine into his office and interviewed her for the job.

_______ Josephine neatly and completely filled out the form and returned it to Miss Jones.

_______ She said goodbye to Miss Jones and drove home.

_______ Josephine drove her car to the office of John Able and Company.

_______ Josephine got up Thursday morning to get ready for her job interview with Able and Company.

KEY:

The sequence is 8, 2, 5, 4, 7, 6, 9, 3, 1

COMPETENCY PROFILE

for

COMMUNICATION ARTS/READING - LEVEL II

Name:____

Starting Date_______________________

Completion Date_____________________

(date/initial)

	QUALIFIED	NOT QUALIFIED
CA/R-II-1 Reinforcing Reading Skills		
Reads Critically		
Comprehends Material Read		

CERTIFICATE OF COMPETENCY AWARDED____

Date Initials

COMMUNICATION ARTS/SPEAKING

DESCRIPTION

Most people use spoken communication more frequently than written communication. Because oral communication is so much a part of our everyday lives, we often overlook our inadequacies and take for granted that we are successful oral communicators. However, the number of errors and misunderstandings seem to indicate that there is room for improvement in the oral skills. The words we use, the way we put them together, our tone, pitch, volume, rate, enunciation, and pronunciation, all add up to a "you" that is evaluated by others. Therefore, we should be as much concerned about speech improvement as we are about personality improvement--for the two are inseparable. To many people your speech is you!

OVERVIEW OF LEVELS

LEVEL I	LEVEL II	LEVEL III	LEVEL IV
Importance of Speaking in Business Awareness of Barriers to Oral Communication Role of the Speaker Development of a Personal Speaking Improvement Program	Reinforcing Speaking Skills		

COMMUNICATION ARTS/SPEAKING - LEVEL I

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
CA/S-I-1	Given a speech checklist and the opportunity to hear a speaker	the student will evaluate the speaker by filling out the checklist and giving reasons for the "fair" rating	at 100 percent completion.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
CA/S-I-1	Importance of Speaking in Business Speaking and Learning Speaking and the Job Speaking and Other Communication Arts Speaking and Reading Speaking and Listening Speaking and Writing Forms of Communication Used	CA/S-I-1	Present a lecture that will lead to class discussion on the importance of speaking in business. Correlate information to the text used by the class or available for reference. Students and entry-level workers need to understand the relationships of speaking to other communications. Have students discuss each of the following topics: How effective speaking skills help students succeed. How effective speaking skills help new business employees succeed on the job. Assign students to collect examples illustrating the various needs for speaking: learning, job, pleasure. Conduct a class discussion: How speaking improves one's listening, writing, and reading abilities. List major points on chalkboard. Have students identify as many business positions as they can that require almost exclusive use of oral communication. Teacher could list positions on chalkboard. Introduce emerging technologies that apply to speaking activities on the job. Refer to other modules in the Guide, such as Mail Processing and Word/Information Processing. REFER TO: GUIDE FOR INTEGRATING FBLA INTO THE CLASSROOM publication, pages 2.32 to 2.35 for speaking activities related to FBLA/PBL.

COMMUNICATION ARTS/SPEAKING - LEVEL I

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Importance of Speaking in Business (Continued)		
	Barriers to Oral Communication Distraction Attitudes Ego-Involvement Role of the Speaker Organizing Thoughts Using Clarity and Coherence Stating Facts and Details Accurately Idiosyncrasies Attitude Toward Listener		Explain and demonstrate the barriers to oral communication. Divide class into four groups. Assign each group one of the barriers to speaking communication and ask that they present several situations in which the barrier is present. Divide the class into teams of two. Practice identifying the barriers as directed in the preceding activity. When to talk and when not to talk: Different companies' policies on confidentiality can be discussed and compared. Divide class into four groups. Have each group select a prominent individual (in politics, sports, or the arts) who frequently appears before the public in some type of speaking role. Have each group list factors--pro and con--that affect the individual's speaking effectiveness. Have students listen to a local radio or TV news broadcast and rate its effectiveness in terms of preparation, delivery, substance, and closing. Was it interesting? Why or why not? Have each student analyze your speaking habits in one of your classes for one week; prepare a list of good and bad habits observed; orally present finding of some of the students' observations to class. Have students suggest ways that a beginning public speaker can overcome the common problems enumerated below: 1. Excessive verbalizing (using "uh", "ya know", "anda" and so on). 2. Nervousness. 3. Annoying mannerisms, like scratching head or toying with speech notes. 4. Reading all or most of the speech.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Importance of Speaking in Business (Continued)		

	Role of the Listener
	  Questioning
	  Interpreting
	  Indicating Interest
	  Idiosyncrasies
	Development of Personal Speaking Improvement Program
			Have each student list idiosyncrasies of speakers that annoy, distract, etc., from the purpose of the speech or conversation. (For variety, list idiosyncrasies of listeners.)
			HINT: If this segment preceds the Listening unit, the Role of the Listener may need to be introduced at the same time as the Role of the Speaker.
			In pantomine, have each student try to express before the class some mannerisms on walk, hand movements or facial expressions that distract and impede speaking. Then express the opposite positive characteristic that would help set a positive stage for the speech. Was the class able to guess the point each student was trying to make?
			Invite school's speech instructor to speak on oral communications. Have students take notes on the important concepts presented. Have class discussion based on notes taken by students at a later time.
			Administer a series of tests to measure the student's ability to speak. Recording voices is a time-saving method to test.
			Provide the students with a checklist of items that are appropriate to the tests and results. Work with students to prepare an individual program for improvement of weak speaking skills. Design the evaluation form to allow for periodic evaluation throughout the year.

COMPETENCY PROFILE

for

COMMUNICATION ARTS/SPEAKING - LEVEL I

Student Name:______________________________

Start Date____________________

Completion Date____________________

(date/initial)

QUALIFIED	NOT QUALIFIED

CA/S-I-1 Characteristics of Speaking In Business

- Recognizes speech organization
- Evaluates Delivery and Mannerisms
- Determines effectiveness of speaker/speech

CERTIFICATE OF COMPETENCY AWARDED______________________________

Date Initials

COMMUNICATION ARTS/SPEAKING - LEVEL II

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
CA/S-II-1	Given a current business related news item	the student will give a two minute speech	with a minimum average rating of three for all items on the checklist

COMMUNICATIONS ARTS/SPEAKING - LEVEL II

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
CA/S-II-1	Reinforcing Speaking Skills Voice Quality Volume/Pitch Tone Tempo Inflections Articulation Enunciation Pronunciation Fluency Word Choice Appropriatenesss Correctness Vocabulary Presentation Variation Eye Contact Posture and Movement Public Speaking Settings Group Discussion Panel-Forum Symposium/Forum Debate Lecture Radio and TV	CA/S-II-1	During the student's oral presentation, the other members of the class can use an appropriate evaluation checklist to provide feedback. Recordings can also be made of the presentations. Have each student select a paragraph of approximately 100 words, read the paragraph aloud, and maintain good eye contact with the audience. HINT: Enunciation is the distinctness or clarity with which each of the sounds of a word is uttered. Saying "runnin" for "running" or "gonna" for "going to" are examples of careless enunciation. Pronunciation is the sound that the speaker gives to the various letters or combination of letters or to the way in which the speaker accents the word. Comparable - pronounced kam-par-able. Without using gestures or written diagrams, have students give directions for the following: 1. How to reach the school cafeteria from the classroom in which this subject is taught. 2. How to fold a letter for mailing in a No. 10 envelope. Have students describe an object orally without telling the class what the object is. If the object has been described clearly, the class should be able to identify it from the description. Introduce types of public speaking listed in outline and illustrate how each is important. Integrate these into FBLA/PBL activities.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Reinforcing Speaking Skills (Continued)		
	Person-to-Person Communications Purposes Increase Understanding Persuasion Problem Solving Human Relations Public Relations		Present a lecture that will lead to class discussion on the importance, purposes and types of person-to-person communications. Give each student a copy of the Speech Checklist. Show by the use of examples what each of the 15 points mean and how each would be measured.
	Types Problem Solving Data Gathering Employment Indoctrination Performance Disciplinary Grievance Reception		REFER TO: COMMUNICATION ARTS/SPEAKING, page 15 Have students outline and present short speeches to class. Topics may be sports, favorite foods, news or business events. Class members will make constructive suggestions by using the speech checklist.
	Public Speaking Pointers Consider Audience Limit Subject Talk, Don't Read Check Volume Use Conversational Tone Keep Chin Up Look at Audience Practice, Practice, Practice		HINT: After selecting the topic and gathering and organizing the data, the students are ready to begin outlining their speeches. The following is a simple guide to preparing an outline for the speech: 1. Speech Title ——— Time Allotted 2. Purpose of Speech 3. Introduction (arouse interest and give purpose) 4. Body of Speech—Principal ideas to support purpose a. Principal ideas No. 1 Supporting information and material b. Principal idea No. 2 Supporting information and material, etc. 5. Conclusion a. Summary of principal ideas b. Plea for action (if applicable)

COMPETENCY PROFILE

for

COMMUNICATION ARTS/SPEAKING - LEVEL I

Student Name:______________________________

Start Date____________________

Completion Date____________________

(date/initial)

QUALIFIED	NOT QUALIFIED

CA/S-II-1 Reinforcing Speaking Skills

CERTIFICATE OF COMPETENCY AWARDED______________________________

Date Initials

COMMUNICATION ARTS/WRITING

DESCRIPTION

Writing is often the only practical means of communication possible in the business world. It is estimated that 80 percent of business is conducted wholly or partially by mail. While writing serves many purposes, in business one goal predominates--to get results. Writing communication requires skill in human relations and persuasive reasoning. Being able to express a point of view in such a way that the reader accepts it and remains a friend is an art.

This unit may be useful in preparing students for competing in FBLA/PBL, the Arizona State sanctioned co-curricular student organization. Competitive events: Business Communications, Job Interview, Stenographer I, Stenographer II, Corresponding Secretary, Job Description Manual, Chapter Reports, Mr. and Ms. Future Business Leader of America, Mr. and Ms. Future Business Executive, Mr. and Ms. Future Business Teacher.

OVERVIEW OF LEVELS

LEVEL I	LEVEL II	LEVEL III	LEVEL IV
Importance of Writing in Business Strategies for Message Development Forms of Communication Used	Writing Skills Elements of Written Communications	Refinement and Application of Written Communication Skills	

COMMUNICATION ARTS/WRITING - LEVEL I

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
CA/W-I-1	Given sample letters, access to reference sources, and a list of questions	the student will answer the questions	with 80 percent accuracy.

COMMUNICATION ARTS/WRITING - LEVEL I

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
CA/W-I-1	Importance of Writing in Business Need for Effective Writing Writing and Learning Writing and the Job Writing and the Other Communication Arts Writing and Reading Writing and Listening Writing and Speaking Criteria for Effectiveness Forms of Communication Used	CA/W-I-1	Develop four reasons why effective communications are important through class discussion and audio-visual aids: 1. They carry on the business of the organization by getting the reader to do what is necessary. 2. Letters are a major expense, and this investment should not be wasted. A good letter costs no more than a poor one and usually costs less. 3. When a letter makes a good impresssion on the reader, it can help to influence public opinion and create a favorable sales climate. 4. You can help yourself professionally by writing effective letters. Discussion topic: "Why Written Communications?" 1. Confirm agreements and actions 2. Motivate sales 3. Build goodwill and effective public relations 4. Enhance human relationships 5. Keep people informed HINT: Because the most frequently used media of business communications is the memorandum, much of the student's practice should be devoted to its development and correct use. Many of the early activities that specifically apply to memorandums are transferable to other more formal communications and need not be repeated. They can be expanded and refined for use in other media such as the letter and the report.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Importance of Writing in Business (Continued)		
	Message Development Forms Formal/Informal Internal/External Appearance Message Unity Organization Coherence Emphasis Parts and Placement Introduction Body Conclusion		REFER TO: WORD/INFORMATION PROCESSING, page 44 TYPING, various parts of letters and proofreading REFERENCE SOURCES, various parts Assign the class to make a collection of letterheads, business letter styles, business correspondence, social-business correspondence, memorandums, business reports, telegrams, minutes, news releases, announcements, and application blanks to use for bulletin board displays. Practice selecting appropriate salutations and complimentary closings from a standard reference source. Compare various letter styles actually used in business and have students discuss what letter arrangement style they prefer and why. REFER TO: The GUIDE FOR INTEGRATING FBLA INTO THE CLASSROOM publication, pages 2.36 to 2.46 for writing activities related to FBLA/PBL.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Importance of Writing in Business (Continued)		
	Strategies for Message Development Proofreading Penmanship		HINT: Writing of any type is a creative process, and heavy criticism can be devastating to the student's psyche. Any text on business communications emphasizes "positive attitude," and we should remember this fact in grading student's papers. Successful teachers of business communications sometimes give two grades for written work, one for form and one for content, averaging both for the grade that is recorded. Illustrate how poor proofreading can lead to costly errors. The student can develop a list of examples. Introduce proofreaders's marks. REFER TO: TYPING, page T-16 for sample exercise on proofreader's marks. Illustrate how poor penmanship can lead to costly errors. Examples: entries on order forms and checks, information for filing (and finding!), scheduling, dates, addresses which result in non-delivery, etc. Assign students practice office situations in which information is recorded by hand—telephone memos, writing in columns and on lines, checks, orders, dates, transferring figures from one form to another, etc. Check for handwriting and proofread for accuracy. Do not accept illegible handwriting. Integrate handwriting skills with activities in other modules in building business skills. Vocabulary activities or completing handwritten forms such as an application blank are examples.

COMMUNICATION ARTS/WRITING CRITERION-REFERENCED MEASUREMENT - LEVEL I

CA/W-I-1 WRITING (PART A)

Student Name____________________________Date_______________Score__________

DIRECTIONS: In the Answers column write the name of the part of the business letter to which each number refers.

ANSWERS

1502 London Drive
Miami, AZ 85534
June 20, 1981

1 _______________________

Mr. Hal Anderson
Anderson Insurance Agency
P. O. Box 359
Globe, AZ 85501

2 _______________________

Dear Hal:

3 _______________________

Your note plus the clipping is still more proof that the busiest people also are those who find time to put nice thoughts into action.

And, as further evidenced by your thoughtfulness, you know what a great help "outside" information can be.

Thank you for remembering me, and many, many thanks for putting the remembrance into action.

4 _______________________

Sincerely,

5 _______________________

(Mrs.) Jean Grey

6 _______________________

ck

7 _______________________

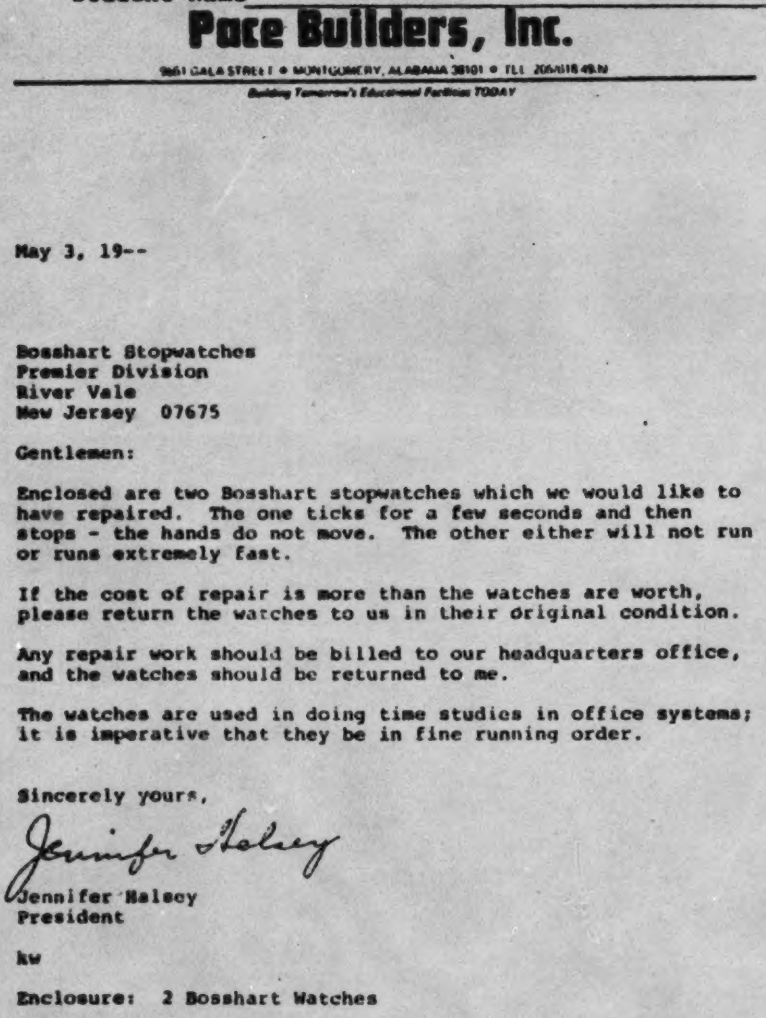
KEY:
1. Heading 2. Address 3. Salutation (Greeting)
4. Body (Message) 5. Complimentary Close
6. Signature 7. Stenographic Reference

CA/W- 6

COMMUNICATION ARTS/WRITING CRITERION-REFERENCED MEASUREMENT - LEVEL I

CA/W-I-1 WRITING (PART B)

Student Name________________________ Date ____________________ Score____________



Pace Builders, Inc.

[illegible] GALA STREET • MONTGOMERY, ALABAMA 36101 • TEL [illegible]

Building Tomorrow's Educational Facilities TODAY

May 3, 19--

Bosshart Stopwatches
Premier Division
River Vale
New Jersey 07675

Gentlemen:

Enclosed are two Bosshart stopwatches which we would like to have repaired. The one ticks for a few seconds and then stops - the hands do not move. The other either will not run or runs extremely fast.

If the cost of repair is more than the watches are worth, please return the watches to us in their original condition.

Any repair work should be billed to our headquarters office, and the watches should be returned to me.

The watches are used in doing time studies in office systems; it is imperative that they be in fine running order.

Sincerely yours,

Jennifer Halsey

Jennifer Halsey
President

kw

Enclosure: 2 Bosshart Watches

DIRECTIONS: Please read the letter to Bosshart Stopwatches and answer the following questions. If you wish, you may use a reference manual.

1. What is the salutation used in this letter?
   ____
2. Is the style used--block/full-block--an acceptable letter style?__________(yes or no)
3. If the sender's name were not typed, could you be positive of her full name based on her handwriting? ____________ (yes or no)
4. How many paragraphs are in the body?__________
5. Can you find any typographical errors in the body of the letter?________(yes or no) Circle any error you might have found.
6. What is the complete mailing address to be used in returning the watches if the cost of repair is more than the watches are worth?
   ____
   ____
   ____
7. Is the tone of the letter positive or negative?
   ____
8. Is the salutation appropriate for the inside address?____________
9. How many watches are being sent to Bosshart Stopwatches?______ How many times is the number of watches being sent stated in the letter?______
10. What is the complimentary closing being used?
    ____
11. Is the letter an example of an internal or external communication?____________

COMMUNICATION ARTS/WRITING CRITERION-REFERENCED TEST - LEVEL I

CA/W-I-1 - WRITING KEY

1. Gentlemen
2. Yes
3. No
4. 4
5. No
6. Pace Builders, Inc.
   9651 Gala Street
   Montgomery, Alabama 36101
7. Positive
8. Yes
9. 2, 2
10. Sincerely yours
11. External

COMPETENCY PROFILE

for

COMMUNICATION ARTS/WRITING - LEVEL I

Student Name:________________________________

Start Date____________________

Completion Date____________________

(date/initial)

	QUALIFIED	NOT QUALIFIED
CA/W-I-1 Importance of Writing in Business		
Parts of a letter		
Proofreading		
Analysis of a letter		
Letter styles		

CERTIFICATE OF COMPETENCY AWARDED________________________________

Date Initials

COMMUNICATION ARTS/WRITING - LEVEL II

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
CA/W-II-1	Given a job-related situation requiring a written response	the student will write the body of a letter and arrange all the parts in mailable form (Type whenever possible)	with all items on the checklist rated acceptable.

COMMUNICATION ARTS/WRITING - LEVEL II

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
CA/W-II-1	Writing Skills Sentence Unity Coherence Power Variety Paragraph Structure Development Unity Coherence Power Word Choice Psychological Effect Good News Persuasive Bad News General Vocabularies Trite Expressions Slang Hackneyed Expression Rubber-Stamp Expressions Special Vocabularies Jargon	CA/W-II-1	HINT: Paragraph construction involves the following elements: Topic Sentence: expresses the main idea of the paragraph. Substance: concerns such details as examples, comparisons, contrasts and is closely connected to the problem of sequence. Sequence: contains a logical method or order for organizing the material. Transition: contains words which show the relationship between ideas in two sentences. Emphasis: results from skillful use of position and proportion. (The major idea reflects its importance when placed in a strategic position, which is usually at the beginning or the ending of the paragraph.) The proportion of space devoted to a point also reflects its significance to the total communication. Give the students a selection of instructions, approximately a sentence in length, that do not appear to be clear. Have the student rewrite them so that they are understandable. Occasionally have students work in pairs whem composing. By working together they will be able to help each other choose the best thought, sentence structure and words. Assign the students to write short solutions to human relations problems stressing composition at the typewriter. Emphasize the need of using general and special vocabularies for effective communication.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Writing Skills (Continued) Written Communication Criteria Favorable First Impression Create Interest Clear and Complete Reader's Point of View Correct in Detail Concise Courteous, Friendly, and Sincere Flows Smoothly Well Paragraphed Avoids Jargon Gets Action Promotes Goodwill Vehicles to Carry Messages Letters Orders--Asking, Granting, Refusing Remittance--Sending, Acknowledging Inquiry--Asking, Granting, Refusing Appointment--Asking, Granting, Refusing Credit--Asking, Granting, Refusing		Assign students to bring to class examples of four types of letters. Be prepared to discuss: the kind of letter, the reason the letter was written, the organizational plan used to write the letter. HINT: The elements of effective written communication may be called the six "C's": Clear, Courteous, Concise, Complete, Correct, and Conversational. HINT: Help students to "Think Before Writing". Emphasize that students learn to list ideas, evaluate the list, and rearrange if necessary before the writing of sentences, paragraphs, letters. Stress the importance of getting to the point without wasting words in all writing activities. Examples of properly and poorly structured sentences, paragraphs, and letters can be duplicated or shown on an opaque projector to illustrate to the class the value of good organization in communication. Have students discuss or write improved versions of items shown; check for proper structure. HINT: There is no way a person can become a good writer unless first mastering the mechanical aspects of writing. This is not to say that the first part of this unit should be devoted to a complete review of grammar. Instead, grammar should be built into the writing program and assignment given on the basis of individual need.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Writing Skills (Continued) Acknowledgement--Delayed Reply Employer's Absence Collection Claim and Adjustment Sales Resume and Job Application Transmittal Follow-Up Human Relations Congratulations Thanks and Appreciation Sympathy and Encouragement Recommendations Introductions Invitations Reservations Announcements Engagements Illness and Injury Condolence Letters Unique to Special Job Cluster Form Letters Other Vehicles (Refer to Media/Document chart, W/IP, page 44)		Assign students to list the types of letters the following persons might write in a typical month: housewife, dentist, clothing store owner, librarian, school principal. Use bulletin boards and transparencies to illustrate the different kinds of business letters written by companies. Assign students to discuss the different kinds of letter their families have received during a week. Discuss the kind of business letter the student would write to: 1. obtain free brochure on caring for house pets. 2. report that a stereo speaker ordered was received in damaged condition. 3. apply for a position with the Empire Corporation. 4. open a charge account. 5. order boxes of stationery. 6. congratulate a business acquaintance who has been selected president of the local chamber of commerce. 7. remind a customer that the account is overdue. 8. send a customer a requested catalog. Have students discuss the organization plan that should be used to write each letter. Discuss legal aspects of certain kinds of letters written that could generate unnecessary legal action. REFER TO: BUSINESS LAW

COMMUNICATION ARTS/WRITING CRITERION-REFERENCED TEST - LEVEL II

(Instructor Directions: Be sure that the evaluation sheet is available to the students. Provide Letterhead paper and an envelope)

CA/W-II-1

Part A

Write (or type if possible) the body of a letter for the following situation. Plan and write carefully so that your letter will meet the eleven points of the checklist to be used by your teacher. Have your work evaluated before preparing the final letter in Part B.

You may use any reference sources and notes that will help you. Your neighbor is not a reference source.

Roger Butler is a COE student who will graduate from Riverside High School in June. His employer wants to buy an electric typewriter for Roger's use within the next two months. Roger has used a Webster machine at school and believes it to be a good one.

Roger's employer asks him to investigate the possibility of purchasing a Webster. He asks Roger to outline a letter to send to the Webster Typewriter Company requesting information about its typewriters. He reminds Roger to be sure to ask about different models available, their prices, and where they can be purchased and their delivery dates.

In addition, Roger's employer suggests he ask for literature describing each machine.

Part B

Use the body of the letter you wrote to the Webster Typewriter Company. Complete the letter in mailable form.

You may use any reference sources and notes that will help you.

You will be asked to correct any errors before final evaluation of the activity. Again, refer to the eleven points on the evaluation check list.

Roger's employer likes his letters signed with his name as follows: L. E. Eric, President.

Mr. Eric gives Roger the following information from the Webster Company's business card:

Webster Typewriter Company
398 North Canyon Avenue
Saguaro City, AZ 85000

Use the current date.

Roger has noticed that other correspondence from Mr. Eric has closed with "Cordially yours,".

Complete your envelope as the final step before turning in your activity. (Your friendly postmaster frowns on letters without envelopes.)

CA/W-II-1 WRITING

TEACHER DIRECTIONS: Use this checklist to evaluate the writer. Complete ALL the ratings on this sheet. As feedback for the student being evaluated, briefly comment on any items with an "unacceptable" rating.

The student must achieve an Acceptable rating on ALL items. The activity may be repeated and/or corrected to bring up any rating to acceptable.

Student Name____________________________Date______________Score________

EFFECTIVE BUSINESS LETTER CHECKLIST

	Rating*	
	Acceptable	Unacceptable
1. Used words and phases that are up-to-date and appropriate.		
2. Wrote sentences and paragraphs that are positive in nature.		
3. Wrote in a concise manner, still conveying the original intent.		
4. Wrote from the "you-viewpoint."		
5. Wrote so that it helped to promote goodwill for the company.		
6. Punctuated in correct style.		
7. Spelled all words correctly.		
8. Constructed grammatically correct sentences.		
9. Developed only one main idea in each paragraph.		
10. Made smooth transitions from one sentence to another.		
11. Made smooth transitions from one paragraph to another.		

*All items must be rated Acceptable.

C W-15

COMPETENCY PROFILE

for

COMMUNICATION ARTS/WRITING - LEVEL II

Student Name____

Start Date______________________________

Completion Date__________________________

(date/initial)

QUALIFIED	NOT QUALIFIED

CA/W-II-1 Writing Skills

Elements of Communication

Letter Composition

CERTIFICATE OF COMPETENCY AWARDED____
Date Initials

COMMUNICATION ARTS/WRITING - LEVEL III

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
CA/W-III-1	Given information about incoming correspondence requiring a written response	the student will compose and type a response	with all items rated 'acceptable' on the checklist.

COMMUNICATION ARTS/WRITING - LEVEL III

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
CA/W-III-1	Refinement and Application of Written Communication Skills	CA/W-III-1	The student should be responsible for initiating written communication ativities with limited directions given by the teacher. In-basket writing activities should be emphasized. Team evaluations should be encouraged. At this level, students should have access to typewriters; major portions of work should be typed. Duplicate brief descriptions of situations that require a letter or a request for motel accommodations, a simple merchandise order, an acceptance of an invitation to a banquet, or a brief memorandum to employees informing them of a salary increase. Have students prepare appropriate replies. Have students indicate whether the secretary should compose the letter or whether the supervisor should write it: 1. Your supervisor would like a sample copy of TODAY'S SECRETARY. 2. A customer would like to have an extension of time to pay the account. 3. A customer is having trouble with a machine purchased from your firm. Have students write to companies for materials about entry-level job requirements for specific types of jobs. Letters are to be mailed. Replies should be shown to the class.

COMMUNICATION ARTS/WRITING - CRITERION-REFERENCED MEASUREMENT - LEVEL III

TEACHER DIRECTIONS: Provide the students with an envelope and letterhead, or assign students to prepare a letterhead using this address:

Cactus Publishing Company
400 Roadrunner Drive
Saguaro City, AZ 85000

Be sure that a copy of the evaluation sheet is available for the students to check if a copy has not be given to students during earlier activities. (Next page)

Students should have access to a typewriter at this level of competency. If machine are not in the room, arrangements should be made for "lab" time.

Student Name ______________________________

Date ____________________ Score ___________

DIRECTIONS:

1. Write a letter to the Craft Colony Stores, enclose one of the Cactus catalogs.
2. Obtain from your instructor letterhead and an envelope.
3. You supply correction supplies and other items you might need to compose and type a business letter.
4. Keep your reference sources nearby--use the dictionary.

You work in the order department of the Cactus Publishing Company. An order arrives from the

Craft Colony Stores
Memorial Circle
Tempe, AZ 85281

Craft Colony is requesting 50 copies of the book, MAKING COSTUME JEWELRY FOR PLEASURE AND PROFIT. This is not one of your publications, and you cannot fill the order. You did find out, however, that the publisher is

Research Associates Publications
265 La Barre Street
Palo Alto, CA 93655

CA/W-III-1 WRITING

TEACHER DIRECTIONS: Use this checklist to evaluate the writer. Complete ALL the ratings on this sheet. As feedback for the student being evaluated, briefly comment on any items with an "unacceptable" rating.

The student must achieve an acceptable rating on ALL items. The activity may be repeated and/or corrected to bring up any rating to acceptable

Student Name__________________________ Date___________________ Score_______

EFFECTIVE BUSINESS LETTER CHECKLIST

	Rating*	
	Acceptable	Unacceptable
1. Used words and phases that are up-to-date and appropriate.		
2. Wrote sentences and paragraphs that are positive in nature.		
3. Wrote in a concise manner, still conveying the original intent.		
4. Wrote from the "you-viewpoint."		
5. Wrote so that it helped to promote goodwill for the company.		
6. Punctuated in correct style.		
7. Spelled all words correctly.		
8. Constructed grammatically correct sentences.		
9. Developed only one main idea in each paragraph.		
10. Made smooth transitions from one sentence to another.		
11. Made smooth transitions from one paragraph to another.		

*All items must be rated Acceptable.

COMPETENCY PROFILE

for

COMMUNICATION ARTS/WRITING - LEVEL III

Student Name ______________________________

Start Date ______________________

Completion Date ______________________

(date/initial)

QUALIFIED	NOT QUALIFIED

CA/W-III-1 Refinement and Applications of

Written Communication Skills

Takes Initiative in Composing Written Communication

CERTIFICATE OF COMPETENCY AWARDED ______________________________________
Date Initials

CERTIFICATE OF COMPETENCY

this is to certify that

____

has demonstrated competence in the skills listed on the reverse side of this certificate in the area of

COMMUNICATION ARTS

________________	________________	________________
Completion date	School	Instructor

SPEAKING - LEVELS I AND II

_____ Importance of Speaking in Business
_____ Reinforcing Speaking Skills

LISTENING - LEVELS I AND II

_____ Importance of Listening in Business
_____ Reinforcing Listening Skills

READING - LEVELS I AND II

_____ Importance of Reading in Business
_____ Reinforcing Reading Skills

WRITING - LEVELS I, II AND III

_____ Importance of Writing in Business
_____ Reinforcing Technical Writing Skills
_____ Refinement and Application of Written Communication Skills

LANGUAGE SKILLS - LEVEL I

_____ Basic Language Skills

HUMAN RELATIONS SKILLS

DESCRIPTION

Research indicates that students will experience career changes three to five times before they reach retirement age. Surveys also indicate that the lack of personal skills, not job skills, is the major factor affecting job loss and lack of promotion. Over 300 businesspeople in the State of Arizona have indicated those traits and skills which are important for success on the job. Classroom instruction can help the student develop these personal skills, job-keeping skills, coping skills, and leadership skills.

This unit may be useful in preparing students for competing in FBLA/PBL, the Arizona State sanctioned co-curricular student organization. Competitive events: Job Interview, Mr. and Ms. Future Business Leader, Mr. and Ms. Future Business Executive, Mr. and Ms. Future Business Teacher.

OVERVIEW OF LEVELS

LEVEL I	LEVEL II	LEVEL III	LEVEL IV
Personal Skills Job-Keeping Skills Coping Skills Leadership Skills			

HUMAN RELATIONS SKILLS - LEVEL I

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
HR-I-1	Given the assignment of considering character traits, values, aptitudes, interests, and personal grooming	the student will identify characteristics necessary for success	with 80 percent accuracy.
HR-I-2	Given the assignment of developing job-keeping skills	the student will identify the traits necessary for maintaining employment	with 80 percent accuracy.
HR-I-3	Given the assignment of solving five case studies involving stress and discrimination on the job	the student will write a summary paragraph for each	satisfactorily solving four of the five case studies.
HR-I-4	Given a test covering leadership skills	the student will list the four leadership components, four time-management principles, and seven problem-solving steps	with 80 percent accuracy.

HUMAN RELATIONS SKILLS - LEVEL I

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
HR-I-1	Personal Skills Looking Inside Character traits and values Dependability Honesty/loyalty Integrity Initiative Self-confidence Ambition Respect for self Courtesy Patience Aptitudes and interests Looking Outside General Health Suitability of dress Grooming and cleanliness Mannerisms Voice Body Language	HR-I-1	Discuss and define the outlined character traits and values for good human relations skills. Have a panel of students discuss personality. Display cartoons of personality types. Have professionals such as cosmetologists, odels, nurses, barbers, fashion designers, or coordinators give demonstrations and speak on good grooming. Have an "office day" and have students wear appropriate office dress. Have a style show of appropriate business dress. Install a full-length mirror in the classroom and provide a checklist beside it. REFER TO: HUMAN RELATIONS SKILLS, p. HR 13-14

HUMAN RELATIONS SKILLS - LEVEL I

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
HR-I-2	Job-Keeping Skills Promptness Adaptability Interest Ability to organize Willingness to help others Ability to work under pressure Ability to handle interruptions Ability to learn quickly Sense of humor Willingness to go the extra mile Positive attitude Willingness to grow and improve Ability to follow directions	HR-I-2	Give students assignments which they must organize and prioritize. Stress the effect of personal efficiency on the job by using case studies. Stress businesslike attitudes through room arrangement, organization of the class, and daily procedures within the class. Have a businessperson speak on attributes desired in a beginning employee. Have students role play introductions. REFER TO: HUMAN RELATIONS SKILLS, p. HR 15-16. for Work Attitudes Checklist. REFER TO: APPLYING FOR A JOB, page JA-14

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
HR-I-3	Coping Skills Stress Deal with the cause Pace yourself Realize your limits Learn flexibility Talk out your troubles Develop a positive, outgoing disposition Control your emotions Make the most of your time Streamline your work procedures Accept what you cannot change Discrimination Recognizing discrimination Knowing the law Dealing with sexual harassment	HR-I-3	Utilize role playing and gaming to develop coping skills. Discuss any real situation that a student brings into the classroom from work. Discuss current laws regarding discrimination. (Contact local Department of Economic Security for current laws.)

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
HR-I-3	Coping Skills Stress Deal with the cause Pace yourself Realize your limits Learn flexibility Talk out your troubles Develop a positive, outgoing disposition Control your emotions Make the most of your time Streamline your work procedures Accept what you cannot change Discrimination Recognizing discrimination Knowing the law Dealing with sexual harassment	HR-I-3	Utilize role playing and gaming to develop coping skills. Discuss any real situation that a student brings into the classroom from work. Discuss current laws regarding discrimination. (Contact local Department of Economic Security for current laws.)

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
HR-I-4	Leadership skills Leader defined Sets realistic goals helps group to achieve them Helps individuals unite into group Interested in group rather than self Portrays humanistic characteristics Questions self Maintains ethical practices Shares success Learns from defeat Time Management Planning Set goals Set priorities Using time efficiently Don't waste time Utilize spare time Avoid crises Don't procrastinate Set deadlines Prepare for problems Minimize interruptions Pacing yourself Relate similar activities	HR-I-4	Use role playing, case studies, and decision-making projects. Invite an efficiency expert from a business firm as a guest speaker. Write case problems from real life. Become actively involved in FBLA/PBL for development of leadership skills. Set deadlines for student work and hold to the deadlines to develop good work habits. Use effective pacing of students' work so that they stay busy. Provide a role model by practicing good time management. Discuss steps of time management. Discuss seven steps of problem solving. Solve case studies as a group using the steps of problem solving. NOTE: PERSONALITY DEVELOPMENT FOR WORK, 5th Edition, by Russon & Wallace, South-Western Publishing Co. is a good source for this unit.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Leadership Skills (Continued)		

- Solving Problems
  - Identify the problem
  - Recognize that a choice exists for solutions
  - Generate alternative solutions
  - Evaluate the consequences of each alternative
  - Choose a solution
  - Take action
  - Review the plan

HUMAN RELATIONS SKILLS CRITERION-REFERENCED TEST - LEVEL I

HR-I-1 - PERSONAL SKILLS

1. Identify the traits and values that develop character:

a.

b.

c.

d.

e.

f.

g.

h.

i.

KEYS

a. Dependability
b. Honesty/loyalty
c. Integrity
d. Initiative
e. Self-confidence
f. Ambition
g. Respect for self
h. Courtesy
i. Patience

2. Identify the four areas of personal appearance related to job success.

a.

b.

c.

d.

a. General Health
b. Suitability of dress
c. Grooming and cleanliness
d. Mannerisms

HUMAN RELATIONS SKILLS CRITERION-REFERENCED TEST - LEVEL I

HR-I-2 - JOB-KEEPING SKILLS

1. Identify the work habits and attitudes necessary for job-keeping skills:

a.

b.

c.

d.

e.

f.

g.

h.

i.

j.

k.

l.

m.

KEY

a. Promptness
b. Adaptability
c. Interest
d. Ability to organize
e. Willingness to help others
f. Ability to work under pressure
g. Ability to handle interruptions
h. Ability to learn quickly
i. Sense of humor
j. Willingness to go the extra mile
k. Positive attitude
l. Willingness to grow and improve
m. Ability to follow instructions

HUMAN RELATIONS SKILLS CRITERION-REFERENCED TEST - LEVEL I

HR-I-3 - COPING SKILLS

Directions: Read the following five case studies. Select 4 of the 5 to write a summary paragraph for each discussing methods of coping with stress and discrimination.

Case #1

Jane has been at work in the XYZ Insurance Company for only a few days. A customer comes in with a complaint concerning the rise in his premium. Jane spends a considerable amount of time trying to explain why the rates have been increased. The customer leaves dissatisfied. Her supervisor speaks harshly to her concerning how she handled the problem. How can Jane cope with the tension in this situation?

Case #2

Linda has recently been divorced. Up until the crisis situation in her life she has been a capable worker in the business office of a large corporation. She now is spending a great deal of time on the telephone concerning personal business and her work is beginning to suffer. Her supervisor realizes that she is under stress but must now explain to Linda that her personal life is interferring with her work. How can Linda cope with her problems in relationship to her job?

Case #3

Bill is a capable, dependable worker and is being considered for a promotion. He has been interviewed by Mr. Myers and has passed all tests with flying colors. Mr. Myers tells personnel that he is impressed with Bill's credentials and would like to have him promoted to the position as his personal assistant. The personnel director explains to Mr. Myers that all evaluations of Bill have been favorable excepting one area: Bill devotes a great deal of energy to routine matters; but in a pressure situation he rushes through the job, often makes mistakes, and does not produce his usual high-quality work. How might Bill cope with this situation?

Case #4

James was of slight build and looked younger than his 17 years. He interviewed for a position in the school's Cooperative Office Education program at a local bank. The interviewer was impressed with his application; but when James arrived for the interview, the interviewer explained to James that because of his appearance he did not feel that James would inspire confidence with older customers. How might James cope with this situation?

Case #5

Cathy had worked for a local loan company for approximately one year. A new supervisor was hired and was extremely friendly with the female employees. When speaking with Cathy, he often would put his arm around her. Cathy objected to this too familiar behavior by asking her supervisor not to act in this manner. One week later Cathy received notice that she was terminated for not being a competent worker. How can Cathy cope with this situation?

HUMAN RELATIONS SKILLS CRITERION REFERENCED TEST - LEVEL I

HR-I-4 - LEADERSHIP SKILLS

	KEYS
1. List and discuss the seven steps of problem solving:	
a.	a. Identify the problem
b.	b. Recognize that a choice exists for solutions
c.	c. Generate alternative solutions
d.	d. Evaluate the consequences of each alternative
e.	e. Choose a solution
f.	f. Take action
g.	g. Review the plan
2. List and discuss the four aspects of leadership:	
a.	a. Set realistic goals and help group to achieve them
b.	b. Help individuals unite into group
c.	c. Interested in group rather than self
d.	d. Portray humanistic characteristics 1. question self 2. maintain ethical practices 3. share success 4. learn from defeat
3. List and define the four areas of time management:	
a.	a. Planning Set goals and priorities
b.	b. Using time efficiently
c.	c. Avoiding crises Don't procrastinate Set deadlines Prepare for problems Minimize interruptions
d.	d. Pacing yourself

HUMAN RELATIONS SKILLS LEARNING ACTIVITIES HR-I-1

Personality Rating Sheet #1

Characteristic			Rating		
Sense of humor	5	4	3	2	1
Poised	5	4	3	2	1
Systematic	5	4	3	2	1
Courteous	5	4	3	2	1
Cooperative	5	4	3	2	1
Apathetic	5	4	3	2	1
Easily impressed	5	4	3	2	1
Pays attention	5	4	3	2	1
Determined	5	4	3	2	1
Extroverted	5	4	3	2	1
Practical	5	4	3	2	1
Creative	5	4	3	2	1
Patient	5	4	3	2	1
Alert	5	4	3	2	1
Perfectionist	5	4	3	2	1
Pessimistic	5	4	3	2	1
Logical; Responsible	5	4	3	2	1
Leadership qualities	5	4	3	2	1
Impulsive	5	4	3	2	1
Sensible	5	4	3	2	1
Generous	5	4	3	2	1
Sociable	5	4	3	2	1
Tactful	5	4	3	2	1
Rude	5	4	3	2	1
Deceitful	5	4	3	2	1
Considerate	5	4	3	2	1
Sincere	5	4	3	2	1
Forgetful	5	4	3	2	1
Kind	5	4	3	2	1
Inhibited	5	4	3	2	1
Restless	5	4	3	2	1
Possessive	5	4	3	2	1
Irritable	5	4	3	2	1
Loyal	5	4	3	2	1

HUMAN RELATIONS SKILLS LEARNING ACTIVITIES HR-I-1

Personality Rating Sheet #1 continued

Characteristics			Rating		
Selfish	5	4	3	2	1
Thoughtful	5	4	3	2	1
Independent, self-governing	5	4	3	2	1
Emotionally mature	5	4	3	2	1
Self-control	5	4	3	2	1
Obeys rules	5	4	3	2	1
Perserverant	5	4	3	2	1
Economical	5	4	3	2	1
Jealous	5	4	3	2	1
Naive	5	4	3	2	1
Dependable	5	4	3	2	1
Stubborn	5	4	3	2	1
Critical	5	4	3	2	1
Optimistic	5	4	3	2	1
Easily depressed	5	4	3	2	1
Friendly	5	4	3	2	1
Positive	5	4	3	2	1
Ambitious	5	4	3	2	1
Conceited	5	4	3	2	1
Honest	5	4	3	2	1
Sarcastic	5	4	3	2	1
Inferiority complex	5	4	3	2	1
Enthusiastic	5	4	3	2	1
Resourceful	5	4	3	2	1
Intellectual	5	4	3	2	1
Suspicious	5	4	3	2	1
Shrewd	5	4	3	2	1
Sympathetic	5	4	3	2	1
Emotional	5	4	3	2	1
Self-conscious	5	4	3	2	1
Domineering	5	4	3	2	1
Argumentative	5	4	3	2	1
Broadminded	5	4	3	2	1
Efficient	5	4	3	2	1
Introverted	5	4	3	2	1
Modest; humble	5	4	3	2	1

HUMAN RELATIONS SKILLS LEARNING ACTIVITIES HR-I-1

Grooming Checklist

	Always	Usually	Occasionally	Never
1. I bathe daily				
2. I use deodorant				
3. I shave daily (men)				
4. I shampoo frequently to keep my hair and scalp clean				
5. My hairstyle is suited to my personality				
6. My face is always clean				
7. My makeup is suitable to the occasion (women)				
8. I use cologne, perfume, after shave lotion and hairspray of compatible scents				
9. My hands and nails are always clean				
10. I visit my dentist at least twice a year				
11. I clean my teeth and mouth after I eat				
12. I use mouthwash and/or breath mints to be sure my breath is clean				
13. The clothing I wear is always clean and crisp				
14. When I shop for clothing, I try to purchase easy-to-care-for fabrics				
15. I keep my shoes in good repair, and clean and polished				

HUMAN RELATIONS LEARNING ACTIVITIES HR-I-2

Work Habits and Attitudes

	Always	Often	Sometimes	Never
1. Do you arrive in class on time?				
2. Do you have a cheerful manner about you?				
3. Do you work efficiently?				
4. Do you keep conversation to a minimum?				
5. Do you cooperate with others in the housekeeping tasks in your classroom?				
6. Do you organize your work materials in an orderly fashion?				
7. Do you clean up your work area when your class is completed?				
8. Do you cheerfully and eagerly accept new assignments?				
9. Do you offer help to others when appropriate?				
10. Do you accept interruptions with grace?				
11. Do you work with other students in groups willingly and cooperatively?				
12. Do you follow directions carefully?				
13. Do you attempt to do your best work at all times?				
14. Do you go the extra mile and accomplish more than the minimum?				
15. Do you genuinely attempt to be in class every day?				
16. Do you accept criticism with a positive attitude?				
17. Do you attempt to solve problems before requesting assistance?				
18. Do you look forward to coming to a particular class?				

HUMAN RELATIONS SKILLS LEARNING ACTIVITIES HR-I-2

Work Habits and Attitudes Checklist

Directions: Answer the following questions as honestly as possible. The activity does not need to be turned in.

		Always	Usually	Occasionally	Never
1.	When you make a decision, are you willing to take responsibility for the consequences -good or bad?				
2.	Are you willing to sacrifice your own time to meet deadlines?				
3.	Can you do your own work without more than the usual supervision?				
4.	Do you do what needs to be done rather than wait to be told?				
5.	Do you abide by organization's rules?				
6.	Are you absent from school, work, or appointments for legitimate reasons only?				
7.	Are you on time for work?				
8.	Do you initiate new activities?				
9.	Can you be trusted to be a "keeper of secrets"?				
10.	Do you consider yourself a loyal employee?				
11.	Do you cooperate with other employees?				
12.	Are you willing to accept additional responsibility?				
13.	Are you willing to do something without being told?				
14.	In an emergency, do you do your share of the work?				

COMPETENCY PROFILE

for

HUMAN RELATIONS SKILLS - LEVEL I

Student Name ______________________________

Start Date ______________________

Completion Date ______________________

(date/initials)

	QUALIFIED	NOT QUALIFIED
HR-I-1 Personal Skills		
HR-I-2 Job-Keeping Skills		
HR-I-3 Coping Skills		
HR-I-4 Leadership Skills		

CERTIFICATE OF COMPETENCY AWARDED ______________________________________

Date Initials

CERTIFICATE
OF COMPETENCY

this is to certify that

____

has demonstrated competence in the skills listed on the reverse side of this certificate in the area of

HUMAN RELATIONS

Completion date	School	Instructor

LEVEL I

____ Personal Skills

____ Job-Keeping Skills

____ Coping Skills

____ Leadership Skills

MACHINE DICTATION/TRANSCRIPTION

DESCRIPTION

Dartnell Reports indicated that the cost of producing one page of correspondence had risen to $6.68 in 1981, a 9.02 percent increase over 1980 costs. This cost can be reduced 25 percent through the use of machine dictation. Machine dictation and transcription result in greater efficiency and improved quality of production. Machine dictation serves as the primary source of input for word/information processing.

This unit may be useful in preparing students for competing in FBLA/PBL, the Arizona State sanctioned co-curricular student organization. Competitive events: Stenographer I, Stenographer II, Office Procedures, Corresponding Secretary.

OVERVIEW OF LEVELS

LEVEL I	LEVEL II	LEVEL III	LEVEL IV
Introduction to Transcription	Transcription Development Dictation Techniques	Proficiency in Transcription Composition and Dictation of response to a Letter	Transcription of Specialized Material Composition and Dictation of Original Documents

MACHINE DICTATION/TRANSCRIPTION - LEVEL I
COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
MD/T-I-1	Given one short letter	the student will transcribe	a mailable letter within 45 minutes.

MACHINE DICTATION/TRANSCRIPTION - LEVEL I

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
MD/T-I-1	Introduction to Transcription Equipment Machine Operation Transcription Aids and Techniques Transcription	MD/T-I-1	Present an overview of machines in classroom displaying pictures of available units on the market, or give a verbal presentation including disc, belt, and cassette equipment. Demonstrate how to set up and use transcription unit including properly attaching foot pedal, listening device, inserting software and indicator slip, and adjusting volume, tone and speed control. Go over machine manual with students. Ask a student to demonstrate machine operation to another student. Invite a manufacturer's representative to demonstrate operation of machines. Explain how reference sources such as dictionaries, word division manuals, secretarial reference books, type style-manuals, and company policy manuals may aid in transcription. REFER TO: REFERENCE SOURCES, p. RS-3 Hand out informational sheets regarding grammar, punctuation, spelling, proofreading, style of letters, memos, and reports. REFER TO: COMMUNICATION ARTS and TYPING Assign transcription of approximately 10 short to average length letters and memorandums. (Teacher may wish to have students rough-draft material first before correcting for mailability or make corrections as they transcribe for first copy mailability.)

MACHINE DICTATION/TRANSCRIPTION - LEVEL II

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
MD/T-II-1	Given one average-length letter and one average-length memorandum.	the student will transcribe	in mailable form within 45 minutes.
MD/T-II-2	Given the assignment of dictating prepared material and completing a self-evaluation form	the student will complete the dictation and do a self-evaluation	with an acceptable rating on 8 out of 10 items

MACHINE DICTATION/TRANSCRIPTION - LEVEL II

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
MD/T-II-1	Transcription Development	MD/T-II-1	Assign transcription of approximately 10 longer, more complex letters and memorandums. Carbons and envelopes may be included.
MD/T-II-2	Dictation Techniques of Prepared Materials	MD/T-II-2	Assign students to transcribe the document in mailable form. Assign students to dictate from prepared documents reminding each to: 1. Identify self. 2. Indicate the type of document (letter, memo, report). 3. Give complete instructions. 4. Control voice level. 5. Control rate of speech. 6. Spell appropriate words and names. 7. Indicate paragraphs. 8. Indicate special punctuation and capitalization. 9. Indicate proper marks on indicator slip. Distribute Dictator's Assessment Checklist REFER TO: MACHINE DICTATION/TRANSCRIPTION, page MD/T 6.

MACHINE DICTATION/TRANSCRIPTION - CRITERION-REFERENCED MEASUREMENTS - LEVEL II

DICTATOR'S ASSESSMENT CHECKLIST

	Needs Improvement	Good
The dictator:		
1. Identified self.		
2. Identified number of copies to be made.		
3. Identified type and number of documents to be transcribed.		
4. Used a proper tone and level of voice.		
5. Used a proper rate of speech.		
6. Pronounced words distinctly.		
7. Provided proper spelling of names and technical vocabulary.		
8. Provided paragraphs.		
9. Provided special punctuation when appropriate.		
10. Indicated proper marks for length of dictation and corrections on indicator slip.		

MACHINE DICTATION/TRANSCRIPTION - LEVEL III

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
MD/T-III-1	Given three letters of 150 words each	the student will transcribe the letters with appropriate copies	in mailable form within 45 minutes.
MD/T-III-2	Given the assignment of composing and dictating a response to a letter and completing a self-evaluation form	the student will complete the dictation and do the self-evaluation	with an acceptable rating on 10 out of 12 items.

MACHINE DICTATION/TRANSCRIPTION - LEVEL III

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
MD/T-III-1	Proficiency in Transcription	MD/T-III-1	Assign approximately 15 letters, memorandums and reports of varying length and complexity to be transcribed. The student will be responsible for preparing mailable documents and for preparing envelopes and attaching enclosures where needed.
MD/T-III-2	Composition and Dictation of Response to a Letter	MD/T-III-2	Assign composition and dictation of responses to three letters. Students should consider: 1. Organization of thoughts 2. Proper information given to transcriber 3. Spelling of appropriate names, addresses, and technical vocabulary 4. Proper closing instructions Allow student to compose material using a prepared outline at the beginning of composition. Progress to shorter notes for composition. Distribute Dictator's Assessment Checklist. REFER TO: MACHINE DICTATION/TRANSCRIPTION page MD/T 9.

MACHINE DICTATION/TRANSCRIPTION - CRITERION-REFERENCED MEASUREMENT - LEVELS II, III, and IV

DICTATOR'S ASSESSMENT CHECKLIST

The dictator:

	Needs Improvement	Good
1. Identified self.		
2. Idenfified type and number of documents to be transcribed.		
3. Identified type and number of copies to be made.		
4. Used a proper tone and level of voice.		
5. Used a proper rate of speech.		
6. Pronounced words distinctly.		
7. Provided proper spelling of names and technical vocabulary.		
8. Provided paragraphs.		
9. Provided special punctuation when appropriate.		
10. Indicated proper marks for length of dictation and corrections on indicator slip.		
11. Composed a complete, clear, and courteous message.		
12. Employed a _you_ attitude in message.		

MACHINE DICTATION/TRANSCRIPTION - LEVEL IV

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
MD/T-IV-1	Given three items of 150 words in an area of specialization	the student will transcribe	the documents in mailable form.
MD/T-IV-2	Given an assignment of composing and dictating an original document and completing a self-evaluation form	the student will successfully complete the dictation and do a self-evaluation	with an acceptable rating on 10 out of 12 items.

MACHINE DICTATION/TRANSCRIPTION - LEVEL IV

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
MD/T-IV-1	Transcription of Specialized Material Legal Medical Insurance Technical Statistical Government Military	MD/T-IV-1	Allow the student to choose an area of interest such as legal, medical, insurance, education, technical, or statistical and transcribe for mailability several items of various length and complexity. Assign several items to be transcribed for mailability from the various areas of legal, medical, insurance, education, technical, and statistical.
MD/T-IV-2	Composition and Dictation of Original Documents	MD/T-IV-2	Assign students to compose and dictate three original letters, memorandums, or reports. Distribute Dictator's Assessment Checklist REFER TO: MACHINE DICTATION/TRANSCRIPTION page MD/T 9.

COMPETENCY PROFILE

for

MACHINE DICTATION/TRANSCRIPTION

Student Name________________________________

Start Date____________________

Completion Date____________________

(date/initial)

		QUALIFIED	NOT QUALIFIED
MD/T-I-1	Introduction to Transcription		
MD/T-II-1	Transcription Development		
MD/T-II-2	Dictation of Prepared Materials		
MD/T-III-1	Proficiency in Transcription		
MD/T-III-2	Composition and Dictation of Response Letter		
MD/T-IV-1	Transcription of Specialized Material Legal ___ Medical ___ Insurance ___ Technical ___ Statistical ___ Government ___ Military ___		
MD/T-IV-2	Composition and Dictation of Original Documents		

CERTIFICATE OF COMPETENCY AWARDED____

Date Initials

CERTIFICATE OF COMPETENCY

this is to certify that

____

has demonstrated competence in the skills listed on the reverse side of this certificate in the area of

MACHINE DICTATION/TRANSCRIPTION

Completion date

School

Instructor

LEVEL I

____ Can Operate Transcription Equipment

LEVEL II

____ Can Transcribe Accurately Letters, Memorandums and Reports

LEVEL III

____ Can Compose and Dictate Correspondence on Recording Equipment

LEVEL IV

Can Transcribe Accurately Letters, Memorandums, and Reports in Specialized Areas:

____ Legal

____ Medical

____ Insurance

____ Technical

____ Statistical

____ Government

____ Military

MAIL PROCESSING

DESCRIPTION

Every business receives and sends mail. Many businesses are using the services of the United States Postal Service as well as electronic mail and various other delivery services. Because of the importance of communication through mail services, it is very important for the student to know and understand mail processing.

This unit may be useful in preparing students for competing in FBLA/PBL, the Arizona State sanctioned co-curricular student organization. Competitive Events: Office Procedures.

OVERVIEW OF LEVELS

LEVEL I	LEVEL II	LEVEL III	LEVEL IV
Outgoing Mail Incoming Mail	Bulk Mailing Other Methods of Processing and Delivering Mail		

MAIL PROCESSING - LEVEL I

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
MP-I-1	Given a list of 15 words and definitions for outgoing mail processing	the student will match the terms with the proper definitions	with 80 percent accuracy.
MP-I-2	Given an in-basket exercise	the student will correctly prioritize 10 pieces of mail	with 80 percent accuracy.

MAIL PROCESSING - LEVEL I

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
MP-I-1	Outgoing Mail Inspect Document Signature Carbon Copies Enclosures Address Mailing Notations Prepare Envelope Address for Optical Character Reader Zip Code Mailing Notations Fold, Insert, and Seal Envelope Determine Class of Postage First Class Second Class Third Class Fourth Class Mixed Classes Franked Free Penalty Special Fourth Class Library Rate	MP-I-1	Collect samples of mail to demonstrate the classes of mail and postal services offered. Give students study guide with terminology defined. REFER TO: MAIL PROCESSING, pages 11-14 Discuss how to handle outgoing mail. Discuss Optical Character Reader. Invite a speaker from the Post Office. Invite an employee who works in a mail room of a local business to speak to class. Take a field trip to the mailing room of a local business and/or the Post Office. Prepare a bulletin board illustrating classes of mail, special services, or correctly addressed envelopes. Give assignment to students which state various items to be mailed and have students determine class and/or services of mail to be used.

MAIL PROCESSING - LEVEL I

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Outgoing Mail (Continued) Determine Special Postal Service Registered Insured C.O.D. Certified Special Delivery Special Handling Return Receipt Certificate of Mailing Restricted Express Mail		REFER TO: TYPING, p. T-10 REFERENCE SOURCES, p. R 5-3. NOTE: Arizona Business and Office Education Individualized Instruction Module Packets, 1975, Section F. may be obtained from the Arizona Department of Education.
MP-I-2	Incoming Mail Sort by Department Person Priority of Distribution Special Classes (Certified, Registered, etc.) Confidential (Do not open.) First-Class Mail Circulars, Advertisements Newspapers, Magazines Packages Open and Attach Enclosures Date Correspondence Record Mail in Mail Register Route Mail to Appropriate Department	MP-I-2	Give assignment to students to bring various classes of mail as examples of incoming mail. Simulate incoming mail procedures with which students may work to help them in understanding the handling of incoming mail. Prepare bulletin board illustrating the steps of processing incoming mail. Discuss proper processing of incoming mail. Discuss and demonstrate use of a mail register.

MAIL PROCESSING CRITERION-R[illegible]RENCED TEST - LEVEL I

MP-I-1 OUTGOING MAIL

Directions: Match the following terms with the proper definitions:

_____1. Third-class mail

_____2. First-class mail

_____3. Mixed-class mail

_____4. Fourth-class mail

_____5. OCR

_____6. Second-class mail

_____7. Special Handling

_____8. Certificate of Mailing

_____9. Express Mail

____10. Registered

____11. Insured

____12. Return Receipt

____13. C.O.D.

____14. Certified

____15. Special Delivery

A. First-class mail that is insured up to $10,000

B. Third- and fourth-class mail which is indemnified for the value of the contents up to $400.

C. Mail that cannot be delivered until it is paid for by addressee.

D. Mail that is delivered immediately when received by the Post Office of destination.

E. Third- or fourth-class mail that is handled as first-class mail for an extra fee.

F. A receipt indicating that the mail was received by the addressee.

G. Proof that a piece of mail has been received by the Post Office for mailing.

H. A service that provides proof that first-class mail has been sent and delivered.

I. Mail that is guaranteed to be delivered the next day.

J. Mail that includes handwritten or typewritten material that is sealed against postal inspection.

K. Mail that includes magazines and newspapers.

L. Mail that includes circulars, books, catalogs, and other printed matter weighing up to 16 ozs.

M. Mail that includes merchandise, printed matter, and all other mailable matter that weighs 16 ozs. or more.

N. Mail that contains two classes of postage.

O. A machine that reads printed matter to assist in automatic sorting of mail.

Key for Test

1.	L	6.	K	11.	B
2.	J	7.	E	12.	F
3.	N	8.	G	13.	C
4.	M	9.	I	14.	H
5.	O	10.	A	15.	D

MAIL PROCESSING CRITERION-REFERENCED TEST - LEVEL I

MP-I-2 INCOMING MAIL

Directions: Identify the classification of mail in Column A with the priorities of distribution in Column B. Place answer in Column C.

Column A

1. A copy of the U. S. News and World Report
2. A booklet describing a trip to Hawaii
3. A bill from the telephone company
4. A copy of the Wall Street Journal
5. An insurance policy covering the building
6. A letter from a business associate, certified
7. A purchase order for products sold by your employer
8. A postcard from your employer's aunt in Seattle
9. A letter requesting your employer's attendance at a business conference; a reservation form is included.
10. A brochure for office furniture

Column B

A. Special class of mail

B. Confidential pieces of mail

C. First-class mail

D. Circulars, advertisements

E. Newspapers, magazines

F. Packages

Column C

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

KEY

1. E
2. D
3. C
4. E
5. C
6. A
7. C
8. C
9. C
10. D

MAIL PROCESSING - LEVEL II

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
MP-II-1	Given a list of eight terms and definitions pertaining to bulk mailing	the student will match the terms with the proper definitions	with 80 percent accuracy.
MP-II-2	Given a list of seven terms and definitions pertaining to electronic mail and a question on delivering mail	the student will match the terms with the proper definitions and list three delivery services other than the United States Postal Service	with 80 percent accuracy.

MAIL PROCESSING - LEVEL II

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
MP-II-1	Bulk Mail Determine Class of Postage Third Class Fourth Class Determine Postage Method Metered Precancelled Permit Imprints Calculate Postage (Determined by weight of pieces or total pounds being mailed.) Label Mail Presort by State, City, Zip Code Bundle According to Post Office Regulations Mail at Proper Post Office Include Statement of Mailing Matter	MP-II-1	Discuss bulk mailing, giving examples that student might come in contact with. Discuss procedures of handling bulk mail. Discuss metered mail, precancelled mail, and permit imprints. Assist school office when a bulk mailing is going out of the school. Demonstrate a postage meter, if possible, or show picture of a postage meter.
MP-II-2	Other Methods of Processing and Delivering Mail Electronic TWX and Telex Facsimilie Machine Telegram Mailgram Communicating Word Processor Computer-Based Message System Satellite Communication System Delivery Methods Bus Messenger Service Privately Owned Delivery Services (UPS, etc.)	MP-II-2	Discuss and define electronic mail systems. REFER TO: DATA/INFORMATION PROCESSING, p. D/IP-5 WORD/INFORMATION PROCESSING, p. W/IP-5,25,29,37 Collect pictures of as many different systems as possible. Invite speaker from Western Union to speak on electronic mail. Invite speaker from a business using an electronic-communications system. Take a field trip to an office to observe an electronic communicator. Discuss various methods of delivering mail other than United States Postal Service Assign student to research and list the privately owned delivery services in their area.

MAIL PROCESSING CRITERION-REFERENCED TEST - LEVEL II

MP-II-1 MAIL PROCESSING

1. Match the following terms with the proper definitions:

_____1. Label

_____2. Bulk Mail

_____3. Bundle

_____4. Statement of Mailing

_____5. Metered Mail

_____6. Precancelled

_____7. Permit Imprints

_____8. Presort

a. Third-class mailing of more than 200 pieces or fourth-class mailing of more than 300 pieces.

b. Postage that is applied with a machine and is purchased in quantity from Post Office.

c. A required notation on every piece of bulk mail.

d. Arrangement of pieces of mail according to postal zone.

e. A form that must be presented at Post Office when mailing bulk items.

f. Pieces of mail grouped by specified quantity with string or bands for easier handling.

g. Stamps that may be purchased from the Post Office for bulk mailings. They have adhesive backing for easier use.

h. Purchased from the Post Office, these envelopes are already marked with proper acknowledgement of postage.

KEY:

1. c
2. a
3. f
4. e
5. b
6. g
7. h
8. d

MAIL PROCESSING CRITERION-REFERENCES TEST - LEVEL II

MP-II-2 OTHER METHODS OF PROCESSING AND DELIVERING MAIL

Match the following terms with the proper definition:

___ 1. Satellite Communicate System

___ 2. TWX and Telex

___ 3. Mailgram

___ 4. Communicating Word Processor

___ 5. Facsimile Machine

___ 6. Telegram

___ 7. Computer-Based Message System

a. A direct-dial teletypewriter service provided by Western Union.

b. A type of copier that sends an original document electronically from one location to another.

c. Message transmitted by Western Union wire; rate is based on 15 words.

d. Message sent by Western Union wire and delivered the next day by the United States Postal Service.

e. Machine that allows documents to be transferred electronically between points.

f. A mail system which has computer capabilities to store, process, and deliver communications.

g. An international electronic message service which picks up a beamed message from the earth and transmits that message to the earth at another location.

List three delivery services other than the United States Post Office:

1. ______________________________

2. ______________________________

3. ______________________________

KEY:

Matching
1. g
2. a
3. d
4. e
5. b
6. c
7. f

Three
Delivery Services:
1. Messenger Service
2. Bus
3. Privately Owned
(UPS, etc.)

# COMPETENCY PROFILE
for
MAIL PROCESSING

Student Name: ______________________________

Start Date ______________________

Completion Date ______________________

(date/initial)

	QUALIFIED	SCORE	NOT QUALIFIED
MP-I-1 Outgoing Mail			
MP-I-2 Incoming Mail			
MP-II-1 Bulk Mailings			
MP-II-2 Other Methods of Processing and Delivering Mail			

CERTIFICATE OF COMPETENCY AWARDED ______________________________
Date Initials

MAIL PROCESSING SUPPLEMENT

Definition of Terms (This suplement is listed in the order of the outline.)

First-Class Mail	Mail that must weight 13 ounces or less and consists of sealed letters, forms that are handwritten or typewritten, post cards, checks.
Second-Class Mail	Mail that includes magazines and newspapers. Must have SECOND-CLASS MAIL printed on document.
Third-Class Mail	Mail that is not considered first or second-class and consists of circulars, books, catalogs, and other printed matter weighing up to 16 ounces.
Fourth-Class Mail	Mail that does not fall into first-class, second-class, or third-class and weighs more than 16 ounces. Size of package is an important factor depending on the area to which it is being mailed. Class includes printed matter and merchandise.
Special Fourth-Class test Mail	Mail that includes books, manuscripts, medical information, printed music, sound recordings, printed materials, and 16 MM films.
Library Rate	Mail that is sent to or from libraries, schools, and some non-profit organizations.
Franked Mail	Mail that is used by Members of Congress and certain government officials. No stamp is required. The words PUBLIC DOCUMENT and a written signature in place of the stamp must appear.
Penalty Mail	Mail that is used by legislative and judicial branches of government. Envelopes are marked PENALTY FOR PRIVATE USE.
Free Mail	Mail that is used by the blind or other persons who are not able to read in the conventional manner. Envelopes may not be sealed and must be marked FREE MATTER FOR THE BLIND OR HANDICAPPED in place of the stamp.
Mixed-Class Mail	Mail that contains two classes of postage and is mailed together, such as a package with a letter attached or enclosed. Postage is figured separately on both package and letter.
Registered Mail	First-class mail that is insurecd up to $10,000. This is the safest method to use in mailing money, jewelry, valuables, stock certificates, signed documents. Value of item to be mailed must be declared at mailing point. There is a fee for this type of mail.

MAIL PROCESSING SUPPLEMENT (Continued)

Insured Mail	Third- and fourth-class mail which has been insured for the value of the contents. A special fee is required for this type of mail.
C. O. D.	Collect on Delivery means that before the mail can be delivered to the addressee, the addressee must pay for the item plus postage and C. O. D. charges. Limit on C. O. D. items is $400.00. First-, third-, and fourth-class mail may be sent in this manner.
Special Delivery service.	Mail of any class that is delivered upon receipt in local post office. Extra fee is charged for this type of
Special Handling	Third- or fourth-class mail that needs to be handled as first-class mail. This service is faster than regular fourth-class service but not as fast as special delivery. Extra fee required.
Return Receipt	A receipt indicating that the mail was received by the addressee. Time of delivery, date of delivery, and location of delivery may also be provided. Extra fee required. Available on Certified, Insured, or Registerd mail.
Certificate of Mailing	This provides proof that a piece of mail has been received by the Post Office for mailing. Special fee required. Does not provide that the piece of mail has actually been delivered.
Certified Mail	This provides proof that the mail has been sent and delivered. First-class mail is the only class that may be mailed in this manner. Sender receives a receipt. Extra fee required.
Restricted Mail	Mail that has been registered, insured, or certified may be sent with restricted delivery, meaning that only the addressee may receive the item, not just anyone at the address on the item.
Express Mail	A service provided by the U. S. Postal Service guarantees, next-day service between major U. S. cities. Letters or articles up to 70 pounds may be delivered by 3 p.m. the following business day. Extra fee required.
Bulk Mailing	Third-class bulk mailings include more than 200 identical pieces of mail, or more than 50 pounds of mail including identical pieces. Each individual piece must be less than 16 ounces. Fourth-class bulk mailings include more than 300 identical pieces of mail. Each individual piece must be more than 16 ounces.
Metered Mail	Used in bulk mailings, a business has a postage meter on its premises. The meter is pre-set at the Post Office when the business purchases the amount of postage it needs. When the postage meter runs low, the business must return it to the Post Office and purchase more postage.
Precancelled Stamps	Precancelled stamps may be purchased from the Post Office for bulk mailings. The stamps have an adhesive back for easier use.

MAIL PROCESSING SUPPLEMENT (Continued)

Permit Imprints	Businesses must purchase a permit annually from the Post Office and a quantity of envelopes or wrappers which are imprinted with the permit.
Statement of Mailing	A form required by the Post Office when bulk mailings are mailed.
Label	All third- and fourth-class pieces of mail must contain identification that each piece is either THIRD-CLASS MAIL or FOURTH-CLASS MAIL.
Presort	All bulk mailing must be sorted according to postal zone before mailing.
Bundle	All bulk mailings that have been presorted must be arranged in bundles of a pre-determined amount set by Post Office before being mailed.
TWX and Telex	TWX and Telex use telephone wire for worldwide, direct dial teletypewriter-to-typewriter exchange service at the rate of 100 or more words per minute.
Facsimile Machine	Similar to office copiers; they produce an exact copy of a document. Converts an image into audio signals for transmission and is reproduced in a few minutes at another facsimile machine.
Telegram	Message transmitted by Western Union wire; rate is based on 15 words.
Mailgram on	Message sent by Western Union wire and delivered the next day by United States Postal Service; rate is based 100 words and is cheaper than a telegram.
Communicating Word Processor	Word processor with a communication's option to prepare messages and transmit electronically.
Computer-Based Message System receive	Called computer mail, it is a system which is connected to various public and private communication message system networks. Users of computer mail have names of receivers of the mail in the message system that delivers direct to the receiver's computer. This enables the receiver of the message to choose the time they will deal with their computer mail. With portable terminals, the receiver of computer mail can even mail on the road.
Satellite	A message from a city on earth is beamed to a satellite located about 23,000 miles into space; the message is Communication then beamed back to its destination on earth in less time and is cheaper than if the same data were System transmitted over the telephone lines.

CERTIFICATE OF COMPETENCY

this is to certify that

____

has demonstrated competence in the skills listed on the reverse side of this certificate in the area of

MAIL PROCESSING

Completion date	School	Instructor

LEVEL I

_____ Outgoing Mail Process

_____ Incoming Mail Process

LEVEL II

____ Bulk Mailing Procedures

_____ Other Methods of Processing and Delivering Mail

FILING/RECORDS MANAGEMENT

DESCRIPTION

Filing and records management are vital to the successful operation of any business organization. Records management is a systematic procedure necessary to maintain the files, which includes the creation, control, use, and disposition of records that should be filed, transferred, or discarded. Management also involves selecting equipment and maintaining and improving systems.

The growth of computer assisted retrieval of records and information, the rapid growth of the use of micrographics for both active records and information-storage systems, and the blending of electronic data processing systems with word processing systems have added a new dimension to records processing and control.

This unit may be useful in preparing students for competing in FBLA/PBL, the Arizona State sanctioned co-curricular student organization. Competitive event: Office Procedures.

OVERVIEW OF LEVELS

LEVEL I	LEVEL II	LEVEL III	LEVEL IV
Filing Systems Filing Procedures Equipment and Supplies	Management of Records	Transfer and Storage Control	Records Control--Decision Making

FILING/RECORDS MANAGEMENT - LEVEL I

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
F/RM -I-1	Given a filing test covering alphabetic and subject filing	the student will complete the problems	with 90 percent accuracy.
F/RM-I-2	Given the five steps to filing	the student will sequence and define	with 90 percent accuracy.
F/RM-I-3	Given an objective test covering equipment and supplies	the student will complete the test	with 80 percent accuracy.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
F/RM-I-1	Preview of Records Control Systems Equipment Control	F/RM-I-1	Make arrangements with school personnel to take a field trip on campus to view all systems where records are kept on students and teachers. This may include a visit to guidance, nurse's office, attendance office, principle's office, etc. HINT: Have class discussion first to allow students to suggest where records may be kept.
F/RM-I-2	Filing Systems Alphabetic	F/RM-I-2	Use a telephone directory to compare alphabetic and subject systems. Prepare a handout sheet with the four basic filing systems and examples of each on the top half and drills for each on the lower half. Complete drills orally as a class. After explaining indexing and discussing alphabetic filing rules, have student index names of all students in the class. HINT: Call off names of students at random and have students write each name on a 3" x 5" index card or paper cut to size. Be sure to include a middle initial or name. Have students put the index cards prepared in the above activity in alphabetical order. From the telephone directory (or other source) have students select a minimum of 21 company names--at least three in each letter grouping (i.e. Blaine, Bostch, Brook). After writing or typing (double spaced) each name on a sheet of paper, have students index each name and then type or write an alphabetical listing.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Filing Systems (Continued) Geographic		HINT: For ease in grading, have students select only six names and share with groups of four for a total of 24 names so that answers for each group can be compared.
			Discuss textbook material on geographic systems before doing the next activity.
			List on the chalkboard 18 company names. Provide students with a map of the United States and have each select three states and six cities within each state. Using either file folder labels or 3" x 5" index cards, have students set up a geographical file for the 18 companies--six companies located in each of the three states selected.
			Provide students with a handout sheet illustrating various numbering systems and examples of situations where they are used such as premiums on insurance policies, charge accounts, legal cases, etc. After discussing the handout and textbook materials, take a field trip to the school library to examine the Dewey Decimal System.
	Numeric		Provide students with situations and have each student set up a numbering system including an alphabetic file card control. Tear out pages from an old telephone book (other sources may be used) for students to select names to assign numbers. Each name and number should then be typed (or written) on a 3" x 5" index card. Students then prepare guide cards, sort their cards according to proper procedures explained in texbook and then file behind correct guide card.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Filing Systems (Continued) Subject		Prepare a handout listing (at random) all the courses taught in your school. Use class discussion to explain how subject filing systems are set up. Using the above handout, have students decide subject heading and then group each course under the correct heading. If students do not have a school handbook, display one in the room so that each student may check their own work against the school's grouping. HINT: Charts of Accounts found in accounting books are a good source for teaching number filing.
F/RM-I-2	Filing Procedures Inspecting Indexing Coding Sorting Storing	F/RM-I-2	Give each student two or three copies of sample letters typed on letterhead. Explain any filing procedures which have not been previously discussed and review all other steps having students make notes on the samples. Students should then inspect, index or color code, make cross-reference note (if needed) and determine subject for subject filing. Collect from typing classes letters typed by students. Use these as a source for students to practice filing procedures. Company names will need to be typed on each letter (students can do this) if letterhead was not used. These letters would be a good source for practice in selecting subjects and determining chronological order.
F/RM-I-3	Equipment and Supplies Manual Equipment and Supplies Vertical Cabinets Open Shelf Files Lateral Cabinets	F/RM-I-3	Prepare a bulletin board using as many pictures (from magazines and catalogs) as possible to acquaint students with filing equipment and supplies.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Equipment and Supplies (Continued) Rotary Files Vertical Card File Visible Card Files Mobile Files Hanging Folder Equipment Mechanized Files Electronic Power Driven Word Processing Equipment Processing Machines Storage Mediums Punched Paper Tapes Magnetic Tapes Magnetic Cards Diskettes Internal Storage Mediums Electronic Data Processing Equipment Electronic Systems Storage Mediums Punched Cards Printout Forms Magnetic Tapes Magnetic Disks Magnetic Drums Magnetic Cores Storage Files		Visit local business offices to observe filing systems and equipment. Tour the Business Department and/or any other department or school office which may have some word processing or electronic data processing equipment. Assign students a project of looking up some information on microfilm or microfiche in the school or public library. Order a microfilm or microfiche report which you may use personally and then show it to the class. Check out viewer from your library or audiovisual center so that students may view the film. Visit your school audiovisual center and ask the person in charge to explain the records system used. Invite a guest speaker (office manager, school principal, etc.) to speak on the importance of processing, storing, and retrieving of records. REFER TO : WORD/INFORMATION PROCESSING, pages 28 and 29.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Equipment and Supplies (Continued)		
	Micrographics Equipment and Supplies Cameras Microforms Roll Film Aperture Cards Microfiche Michrofilm Jackets Reader-Viewer Reader-Printer		Use a combination of class discussion, case problems, cartoons, films, etc. to demonstrate the results of not following directions, how records can be inadvertently destroyed or lost, and the dangers of leaving file drawers open at the same time.
	Safety Measures Opening and Closing Files Proper Use of Equipment Following Directions		

FILING/RECORDS MANAGEMENT CRITERION-REFERENCED TEST - LEVEL I

F/RM-I-1 SYSTEMS

Directions: Index and place in alphabetical order in Column B the names listed in Column A.

COLUMN A	COLUMN B
1.	
Jane Smith	
Joseph Lyle	
Robert C. Taylor	
Terry Allison	
2.	
C & M Market	
L. J. Carl	
Linda S. Candelaria	
CAB, Inc.	
3.	
Dent's Auto Shop	
John J. Dents' Supply Co.	
John J. Dent	
John Delander	
4.	
Brother Paul	
Senator James Paul	
Dr. Paul Johnson	
Rev. John Pate	
5.	
Leon DeLaRosa	
Henry DeMiguel	
H. A. O'Brien Co.	
Ricardo DeLuca	

Systems (Continued)

COLUMN A COLUMN B

6.
12 Dollar Motel
1632 Music Co.
Ten-Thousand Club
The 800 Shop

7.
London, England
Hamburg, Germany
Paris, France
Victoria, Canada

8.
Phoenix Community College
Pima Community College
Scottsdale Community College
Arizona Western College

9.
James Smith
J. A. Smith
Mrs. Judy Allen
Mrs. Carl Smith (Judy Allen)

10. Index and place in numerical order in Column B the numbers listed in Column A:

100-10
110-15
200-05
102-05

Systems (Continued)

Directions: Indicate in which subject file the following pieces of correspondence would be placed by drawing a line from the correspondence to the file name.

11. Letter of Application from Mary Jones

12. Renewal of lease

13. Statement from Wall Street Journal for classified ad

Administration
Advertising
Insurance
Personnel
Rent Expense
Miscellaneous

14. Index and place in the correct geographic filing order in Column B the names indicated in Column A. The company using the geographic file is a national firm which files by state.

Pittman Mfg. Co., Austin, Texas ______________________________
Pittman Water Company, Dallas, Texas ______________________________
Pittman Mfg. Co., Mobile, Alabama ______________________________
Pittman Ice Company, Waco, Texas ______________________________

KEY

1. Allison, Terry
   Lyle, Joseph
   Smith, Jane
   Taylor, Robert C.

2. CAB, Incorporated
   C & M Market
   Candelaris, Linda S.
   Carl, L. J.

3. Delander, John
   Dent's Auto Shop
   Dent, John J.
   Dents', John J. Supply Co.

4. Brother Paul
   Johnson, Paul (Dr.)
   Pate, John (Reverend)
   Paul, Janes (Senator)

5. DeLaRosa, Leon
   DeLuca, Ricardo
   DeMiguel, Henry
   O'Brien, H. A. Company

6. Eight Hundred Shop (The)
   Sixteen Hundred Thirty-two Music Co.
   Ten-Thousand Club
   Twelve Dollar Motel

7. Canada, Victoria
   England, London
   France, Paris
   Germany, Hamburg

KEY (Continued)

8. Arizona Western College
Phoenix Community College
Pima County College
Scottsdale Community College

9. Smith, Ann Marie
Smith, J. A.
Smith, James
Smith, Judy Allen (Mrs. Carl)

10. 100-10
102-05
110-15
200-05

11. Miscellaneous

12. Rent Expense

13. Advertising

14. Alabama, Mobile, Pittman Mfg. Co.
Texas, Austin, Pittman Mfg. Co.
Texas, Dallas, Pittman Water Co.
Texas, Waco, Pittman Ice Co.

FILING/RECORDS MANAGEMENT CRITERION-REFERENCED TEST - LEVEL I

F/RM-I-2 FILING PROCEDURES

Directions: The following filing steps are listed in random order. Arrange these steps in correct sequence and define each.

FILING STEPS:	PROPER ORDER	DEFINITION
(1) Coding	____________	____
(2) Storing	____________	____
(3) Inspecting	____________	____
(4) Sorting	____________	____
(5) Indexing	____________	____

SUGGESTED KEY:

1.	Inspecting	Inspects to find out if it has been released for filing. Determines whether or not it has been pre-coded (key title marked) and most important unit underlined.
2.	Indexing	Indexing is dividing names into units and determining order of units, underling key unit, and writing numbers above the remaining units to indicate their rank in the filing order.
3.	Coding	The caption under which the item is to be filed is underscored or written in the top left-hand corner of the document.
4.	Sorting	Arranging correspondence in alphabetic order according to captions.
5.	Storing	The final step of actually placing material in correct storage area.

FILING/RECORDS MANAGEMENT CRITERION-REFERENCED TEST - LEVEL I

F/RM-I-3 EQUIPMENT AND SUPPLIES

Directions: Write your answer in the column at the left.

_____1. Cabinets with two, three, four, and five drawers are examples of (A) open-shelf files, (B) visible files, (C) vertical files, (D) rotary files.

_____2. Open shelving may be preferred over cabinets when (A) the saving of floor space is important (B) a single paper is needed, quickly and often, (C) security is important, (D) records are confidential.

_____3. The most important reason for using any of the various types of power-driven equipment is (A) to impress customers, (B) to move shelves or trays of records into working position by electronic means, (C) to save space, (D) to reduce the quantity of personnel needed.

_____4. Desk stations and the related work areas generally require (A) careful planning, (B) small filing units, (C) transferring papers to less active files, (D) all of these.

_____5. Storage mediums for electronic data processing systems include (A) file folders, (B) aperture cards, (C) rotary card files, (D) magnetic tapes, disks, drums, and cores.

_____6. The main difference in records control between manual filing systems and EDP systems is (A) the number of file clerks needed for each system, (B) a procedures manual is required only for EDP systems, (C) where the information is filed, (D) that indexing systems are used only in manual filing systems.

_____7. Storage mediums for word processing equipment include (A) punched paper tapes, (B) disketts, (C) internal storage, (D) all of these.

_____8. Which of the following is a disadvantage of using microfilm? (A) Original document is not always available. (B) Copy is small and requires less storage space. (C) Copies are easier to transport. (D) Mailing costs are less.

_____9. One advantage of microfiche is (A) paper copies are inexpensive and quick to reproduce, (B) easily updated, (C) can be updated by adding pages, (D) no special equipment is needed to read document.

_____10. When evaluating equipment, which of the following should be considered? (A) cost of new equipment related to worker performance, (B) the area in which the equipment will be located, (C) the various type of records that will be stored, (D) all of these.

KEY
1. C 2. A 3. B 4. D 5. D 6. C 7. D 8. A 9. C 10. D

FILING/RECORDS MANAGEMENT - LEVEL II

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
F/RM-II-1	Given an objective test covering requisitioning, charging, cancelling, tracing and reserving records	the student will complete the test	with 90 percent accuracy.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
F/RM-II-1	Management of Records Requisitioning Charging Cancelling Tracing (Follow-up) Reserving	F/RM-II-1	Divide the class into groups of four. Distribute to each group samples of letters, memos, invoices, purchase orders, checks, etc. and have them set up an appropriate filing system using one folder with guide cards. Then have each group prepare a list of the items in their file and post (names of students on list for group identification) for all students to use or else make one copy for each group. HINT: Samples of materials to distribute may be obtained from typing classes, completed practice sets, etc. Check with other business teachers for discarded materials. Discuss the various procedures used for borrowing materials from files. Have available "Requisition Sheets" and "Out Guides" (refer to samples in textbook to prepare master for copies) for students to use in checking out and returning material from the files prepared in the above activity. HINT: Allow only 15 minutes of four class periods for borrowing, returning, and reserving materials. Materials checked out on the fourth day could be returned at the beginning of the fifth day. Assign each student to be in charge of their group's file one day only. At the beginning of the fifth day each group will check their file against the list prepared earlier to verify that all materials have been returned.

FILING/RECORDS MANAGEMENT CRITERION-REFERENCED TEST - LEVEL II

F/RM-II-1 MANAGEMENT OF RECORDS

Directions: Write your answer in the column at left.

___1. Personnel in records departments aid in (A) controlling who can get materials, (B) lending papers to those who need to borrow them, (C) destroying papers that are not important, (D) all of these.

___2. The records department should control borrowing of materials by following a definite system for (A) requisitioning, (B) charging out, (C) canceling charges, (D) all of these.

___3. It should not be necessary to make a written record of material taken out of a file if the request was (A) made by phone, (B) made by interoffice delivery, (C) made in person, (D) none of these.

___4. An "Out Guide" is used in the records department to (A) indicate the department is closed, (B) put in the file to indicate what mateial has been checked out, (C) put in a file to indicate what material is lost or misfiled, (D) indicate what materials are to be transferred to another file.

___5. Follow-up or tracing is the act of (A) trying to find papers which have been checked out but not returned, (B) trying to locate misfiled papers, (C) tracing misplaced requisitions, (D) both B and C.

___6. Follow-up files are (A) similar to tickler files, (B) used to note dates when action is to be taken, (C) used to file requisitions for material not received, (D) all of the above.

___7. A file which serves as a reminder is often called a (A) a forget-me-not file, (B) a tickler file, (C) a pending file, (D) an open file

___8. One means of checking the frequency of use of papers is (A) how worn the papers are, (B) by checking copies of "OUT" sheets, (C) by sending out a questionnaire to all personnel, (D) none of these.

KEY
1. D 2. D 3. D 4. B 5. A 6. D 7. B 8. B

FILING/RECORDS MANAGEMENT - LEVEL III

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
F/RM-III-1	Given an objective test covering transfer and storage of records	the student will complete the test	with 80 percent accuracy.

580

581

FILING/RECORDS MANAGEMENT CRITERION-REFERENCED TEST - LEVEL III

F/RM-III-1 TRANSFER AND STORAGE CONTROL

Directions: Write your answer in the column at left.

____1. Unneeded records should be (A) destroyed immediately, (B) filed in active files at least 30 days, (C) filed in storage files, (D) none of these.

____2. One reason for destroying certain materials is (A) to have a reason for ignoring complaints, (B) to keep the work area neat and tidy, (C) to eliminate unnecessary costs of keeping records, (D) to eliminate the need for cross-referencing.

____3. Active files (A) should contain all materials received within a stated time period, (B) should contain only those materials that have a high reference value, (C) should be located in an area away from most office personnel, (D) both A and C.

____4. Overcrowded files (A) slow down work in the department, (B) make it difficult to file and retrieve material, (C) discourage the borrowing of material, (D) both A and B

____5. When an individual piece of paper is removed from a folder an (A) out folder should be put in its place, (B) out guide should be put in its place (C) a substitution card should be put in its place.

____6. Highly confidential materials should be destroyed by, (A) selling them for scrap, (B) throwing them in a wastebasket, (C) feeding through a shredding machine, (D) none of these

____7. All materials in the storage area (A) are never used and can, therefore, be stacked in any order to conserve space, (B) should be stacked in areas according to date transferred for ease in destroying, (C) should be adequately controlled for releasing when requested by borrowers, (D) should be placed in underground storage centers for safety.

____8. The most vital records kept by a control center in a storage department are (A) the number of folders in storage, (B) storage record cards, (C) the number of requisitions received, (D) none of these.

____9. Items filed in a tickler file are filed (A) according to date action is needed, (B) alphabetically, (C) numerically, (D) according to date received.

____10. A complete system of records control must include (A) procedures for destroying certain types of records, (B) automated equipment, (C) use of alphabetic, geographic, numeric and subject systems, (D) all of these.

KEY
1. A 2. C 3. B 4. D 5. C 6. C 7. C 8. B 9. A 10. A

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
F/RM-III-1	Transfer and Storage Controls Disposing Immediately Filing For Immediate Reference For Semiactive Reference For Occasional Reference	F/RM-III-1	For class discussion select a specific type of business (i.e. construction company, retailer, hospital) and have student think of various types of material the business might have in their files. List each on the blackboard. After discussing transferring, storing, and destroying materials, have each student categorize the listed items under the heading "Dispose Immediately," "File for Immediate Reference," "File for Semiactive Reference," and "File for Occasional Reference." Have students prepare a list of personal papers considered as permanent records (i.e. social security card, birth certificate). Discuss reasoning behind selections. Prepare an exercise for students to determine whether materials should be in the active, semiactive or storage (final) file. HINT: List only dates and give instructions as to how long materials are to be kept in each file.

FILING/RECORDS MANAGEMENT - LEVEL IV

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
F/RM-IV-1	Given an objective test covering selecting equipment and supplies, selecting maintaining system, and improving records control	the student will complete the test	with 80 percent accuracy.

FILING/RECORDS MANAGEMENT CRITERION-REFERENCED TEST LEVEL IV

F/RM-IV-1 RECORDS CONTROL--DECISION MAKING

Directions: Write your answer in the column at the left.

___1. The selection of equipment should be based on (A) needs, wants, and cost, (B) size, space, and versatility (C) color, quality, and quantity, (D) all of these.

___2. The person selecting equipment should (A) purchase only one manufacturer's brand, (B) become familiar with the basic types of filing equipment, (C) select the least expensive equipment, (D) all of these.

___3. Vertical cabinets may be adapted for use as (A) typing table, (B) desk for file clerk, (C) work counters and dividers, (D) all of the above.

___4. Mechanized equipment may be of definite value (A) when files are seldom used, (B) when using desk filing systems, (C) when there is a need for speed in handling very active records, (D) both B and C.

___5. The Variadex System is a (A) color-coded system, (B) color-accented system, (C) number system, (D) geographic system.

___6. If only vertical cabinets are used, the color system selected should be (A) Super-Ideal, (B) Alpha Code, (C) Alpha-Z, (D) both A and C.

___7. To maintain a good records system (A) related papers within a file folder should be paper clipped together, (B) never leave more than one inch of free space in each file drawer, (C) the number of papers to be placed in each folder should be limited, (D) none of the above.

___8. Which of the following would not be important for good record control? (A) Only personnel assigned should be allowed to operate the filing system; (B) A manual of procedures should be available; (C) Make exceptions to the rule if an executive needs a paper quickly; (D) Records control routines should be carefully planned and strictly followed.

___9. A record should be transferred (A) when it is two years old, (B) according to company policy, (C) according to government regulations.

KEY

1. D 2. B 3. C 4. C 5. A 6. D 7. C 8. C 9. b

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FILING/RECORDS MANAGEMENT - LEVEL IV

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
F/RM-IV-1	Records Control Decision Making Selecting Equipment Selecting Systems Variadex Alpha Code Super-Ideal Alpha-Z Maintaining Systems Improving Records Control	F/RM-IV-1	Have students make a list of errors which may occur in filing and a list of how to reduce or eliminate these errors. Discuss. Divide the class into small groups of two or three and have each group prepare an employee's manual for a beginning file clerk. Circulate manuals for comparison and discussion. Have each student draw a floor plan for filing records and indicate the location for the different types of files (active, inactive, final, etc.) HINT: Students should list measurements and make sure space is allowed for drawers and doors to be opened. Have students write a brief report comparing the four color systems, Variadex, Alpha Code, Super-Ideal, and Alpha-Z, giving advantages and disadvantages. Get copies of two different office equipment and supply companies catalogs and have students prepare a list of filing supplies and equipment needed for records, comparing prices and quality. After listing two prices for each item selected, have student underline the selected price and item. Students should be prepared to justify decisions. SUGGESTIONS: Because it may be difficult to get more than two catalogs, this activity should probably be one that students can work on over a period of time or as an out of class activity with catalogs checked out for one or two days.

COMPETENCY PROFILE

for

FILING/RECORDS MANAGEMENT - LEVELS I, II, III, IV

Student Name:____

Start Date____________________________

Completion Date________________________

(date/initial)

		QUALIFIED	SCORE	NOT QUALIFIED
F/RM-I-1	Filing Systems			
	Alphabetic			
	Geographic			
	Numeric			
	Subject			
F/RM-I-2	Filing Procedures			
F/RM-I-3	Equipment and Supplies			
F/RM-II-1	Management of Records			
F/RM-III-1	Transfer and Storage			
F/RM-IV-1	Records Control—Decision Making			
	Selecting Equipment and Systems			
	Maintaining Systems			
	Improving Records Control			

CERTIFICATE OF COMPETENCY AWARDED____

Date Initials

CERTIFICATE OF COMPETENCY

this is to certify that

____

has demonstrated competence in the skills listed on the reverse side of this certificate in the area of

RECORDS MANAGEMENT

Completion date	School	Instructor

CERTIFICATE

____________ Filing Systems (Alphabetic, Geographic, Numeric, Subject)

____________ Filing Procedures (Inspecting, Indexing, Coding, Sorting, Storing)

____________ Equipment and Supplies

LEVEL II

____________ Management of Records (Requisitioning, Charging, Cancelling, Tracing, Reserving)

LEVEL III

____________ Transfer and Storage (Disposing and Filing—Active, Inactive)

LEVEL IV

____________ Records Control (Selecting Equipment and Systems, Maintaining Systems, Improving Records Control)

REFERENCE SOURCES

DESCRIPTION

It is essential for an employee to know where to find information needed in routine office work. While basic references are found in offices, there are many other sources available for locating information.

This unit may be useful in preparing students for competing in FBLA/PBL the Arizona State sanctioned co-curricular student organization. Competitive events: Clerk Typist-I, Clerk Typist-II, Stenographer I, Stenographer II, Corresponding Secretary, Executive Typist, Extemporaneous Speaking and Public Speaking, Job Description Manual.

OVERVIEW OF LEVELS

LEVEL I	LEVEL II	LEVEL III	LEVEL IV
Introduction to Basic Sources	Introduction to Library References Sources	Location of Information in Various References Sources	Selection of Office Reference Library

REFERENCE SOURCES - LEVEL I

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
RS-I-1	Given the list of basic office references	the student will identify the types of information found in each	with 80 percent accuracy.

REFERENCE SOURCES - LEVEL I

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
S-I-1	Introduction to Basic Reference Sources Office References: Dictionaries Style, Grammar, and Word Usage Manuals Secretarial Handbooks Directories Telephone City Zip Code Postal & Shipping Company Policy Manuals Job Description Manuals Thesauruses Technical References Financial Sources Travel Sources Hotel Red Book	RS-I-1	Collect company policy manuals from businesses. Show each basic reference, comparing organization and content. Use a study guide for students to record information concerning content and organization as each reference is being discussed. Discuss ways of determining the best basic office references to be used in a given situation. Divide class into small teams to compete in finding information. Plan a Treasure Hunt for finding information. NOTE: The Arizona Business and Office Education Individualized Instruction Module Packets published in 1975 has units of instruction on the use of the dictionary and office manual. REFER TO: WORD/INFORMATION PROCESSING, p. W/IP 44.

RS-I-1 - BASIC REFERENCE SOURCES

Identify four specific types of information found in the basic office references given below:

1. Dictionary

2. Telephone Directory

3. Secretarial Handbook

4. Company Policy Manual

5. Zip Code Directory

REFERENCE SOURCES - CRITERION-REFERENCED TEST - LEVEL I - KEY

KEY

1. Dictionary
    - Proper pronunciation
    - Spelling
    - Syllabication
    - Most appropriate usage
    - Meanings of a word
    - Quotations to demonstrate how word is used
    - Illustrations
    - Synonyms
    - Plurals
    - Italicization
    - Writing of Compounds
    - Punctuation
    - Forms of Address
    - Abbreviations
    - Adenda of the more current terms

2. Telephone Directory
    - Address & Telephone number of subscribers
    - Zip code maps of cities
    - Maps of cities
    - Emergency numbers
    - Community information and referral services
    - Directory Assistance
    - Business Office numbers
    - Local, long distance, international calling
    - Money saving tips
    - Pages in Spanish
    - Phone Center Stores
    - New Service

2. Telephone Directory (Cont'd)
    - Repair Service
    - Yellow Pages
        - Suggestions to business
        - ABC listing of business by subject
        - Subject index
    - Connect and disconnect your phones
    - Charges to install or change service
    - Optional services
    - Custom calling services
    - Credit cards
    - Special services for disabled
    - Consumer rights & responsibilites
    - Questions about your bill
    - How to find numbers
    - Long distance rates & area codes
    - Street guide
    - Page for frequently called numbers

3. Secretarial Handbook
    - Style of letters, reports, minutes
    - Word usage guides
    - Punctuation guides
    - Grammar guides
    - Travel arrangements
    - Methods of Communication
    - Abbreviations
    - Correct forms of address
    - Proofreader's marks

3. Secretarial Handbook (Cont'd)
    - Reference sources
    - Word division
    - Securing employment
    - Statistical data
    - Filing systems
    - Units of measure

4. Company Policy Manual
    - Vacation policy
    - Salary policies
    - Promotion policies
    - Attendance policy
    - Sick leave policy
    - Work schedule
    - Probation Policy
    - Chain of Command
    - Departmental structure
    - Dress policy
    - Insurance benefits
    - Retirement benefits

5. Zip Code Directory
    - Zip code lists by state and city
    - Proper addressing of envelopes
    - Special postal services
    - List of Post Offices
    - Mail services
    - Presorting list
    - Domestic postage rates
    - City maps showing zones
    - Counties
    - Service Improvement Programs
    - Special Zip Code Lists
    - Post Office delivery statistics
    - Names of discontinued Post Offices

REFERENCE SOURCES - LEVEL II

COMPETENCY GOALS

the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the ecified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
II-1	Given a list of library reference sources	the student will identify the types of information found in each	with 80 percent accuracy.

REFERENCE SOURCES - LEVEL II

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
RS-II-1	Introduction to Library Reference Sources Biographic References Almanac Atlas Periodical Indexes Reader's Guide Business Index Encyclopedias Etiquette Books Quotation Books	RS-II-1	Show each library reference and compare organization and content. Discuss ways of determining which of the reference sources should be used in a given situation. Give assignment to locate all the business magazines useful in an office that are available in the school library Assign students to summarize articles from business magazines. Assign the students to find the most unique, interesting information in the library and report to the rest of the class. The class votes on the most outstanding information. Winner may be given bonus points or a prize. Assign short report on "Dead Businessperson". ("Dead" is specified because it would mean the person could be researched in most biographical sources.) Play Jeopardy. Using identical reference sources, one team gives the answer to a question and the other team supplies the question to match. Divide the class into teams. Give each team questions on individual cards. References must be cited when giving answers. The opposing team may challenge when they think a wrong or conflicting answer has been given.

REFERENCE SOURCES - CRITERION-REFERENCED TEST - LEVEL II

RS-II-1 - LIBRARY REFERENCE SOURCES

Identify four specific types of information found in the library reference sources given below:

1. Almanac

2. Guide to Periodical Literature

3. Biographic Reference

4. Etiquette Book

5. Atlas

REFERENCE SOURCES - CRITERION-REFERENCED TEST - LEVEL II - KEY

KEY

1. Almanac
    - Memorable dates
    - Agricultural Information
    - Annual rainfall
    - Noted personalities
    - U.S. statistics
    - U.S. states and cities
    - Weather and climate
    - Weights and measures
    - World statistics
    - Writer's guide
    - Current events
    - Election results
    - Astronomy
    - Aviation
    - Calendar of Holidays
    - Maps
    - Great disasters
    - First Aid
    - U.S. Societies and Associations
    - United Nations information

2. Guide to Periodical Literature
    - Subject Index
    - Author Index
    - Periodical Index
    - Article Information
        - Name
        - Author
        - Summary
        - Periodical name
        - Issue date
        - Pages of article

3. Biographical Reference
    - Biography of noted persons
    - Obituaries of noted persons
    - Pictures of noted persons
    - Publications by or about noted persons
    - Highlights of careers

4. Etiquette
    - Correspondence
    - Dress and manners
    - Ceremonies of life (wedding, funeral, graduation, etc.)
    - Public life
    - Home entertaining
    - Household management
    - Family life
    - Travel
    - Restaurant dining
    - Tipping
    - Conversation
    - Business world

5. Atlas
    - Mileage chart
    - Detailed road maps of states and some major cities
    - Listing and location of national parks
    - Population information
    - Map of the U.S.
    - Symbol of road conditions
    - Mileage and driving time map
    - Explanation of map symbols
    - Province maps
    - Miles per gallon computer
    - Telephone area code map
    - Time zones

REFERENCE SOURCES - LEVEL III

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
RS-III-1	Given 5 questions	the student, using appropriate references, will answer the questions and identify the source and page consulted	with 100 percent accuracy.

REFERENCE SOURCES - LEVEL III

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
RS-III-1	Location of Information in Various Reference Sources Office References Technical References Library References	RS-III-1	Assign students to use an employee's office manual and indicate the page where facts about the company, company policies, fringe benefits, etc., can be found. Assign students to use a thesaurus to find two additional words that could be used for each stated word on a list. Assign students to examine reference sources specified and make up one question for each reference dealing with information found in that reference. Submit the list of questions including the name of reference used and the page where the information can be found to answer the question. Compile a list of questions from the students' questions including at least one question from each student covering all references. Students look up the answers. If a student has difficulty locating the answer to a particular question, the teacher or the student who submitted the question could assist in answering the question. Give the students a list of questions to which answers may be found by using all basic references. Record the reference consulted and the page where the information can be found. Give a card to each student with one question to be found in a basic reference. When the question has been answered, student will report to rest of class on the reference.

REFERENCE SOURCES - CRITERION-REFERENCED TEST - LEVEL III

RS-III-1 - REFERENCE SOURCES

Answer the following questions and identify the source and page number where the information was found:

1. How far is it from Phoenix to Washington, D.C.?

Answer ______________________________ Source ________________ page ________________

2. How many publications published last month contained current information on the stock market?

Answer ______________________________ Source ________________ page ________________

3. Who are three outstanding philanthropic businesspersons?

Answer ______________________________ Source ________________ page ________________

____

____

4. Who was President of the United States when Alben W. Barkley was Vice President?

Answer ______________________________ Source ________________ page ________________

5. What is a famous saying about leadership?

Answer ______________________________ Source ________________ page ________________

____

____

____

REFERENCE SOURCES - LEVEL IV

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
RS-IV-1	Given a list of 15 reference sources	the student will select the three most useful office reference books to purchase for a new office and explain the choice	with logical justification.

REFERENCE SOURCES - LEVEL IV

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
RS-IV-1	Selection of Office Reference Library	RS-IV-1	Assign students to explain which reference books are a "must" for every office and be able to justify logically their choices. Discuss with students the various types of references used in specialized office areas. Distribute worksheets to students describing various offices and ask them to select five reference books necessary for the operation of the business.

RS-IV-1 - REFERENCE SOURCES

Choose three books from the list below that you would consider vital to a new business office, and explain the logic of your decision.

1. Etiquette Manual
2. Biographical Resource
3. Almanac
4. Thesaurus
5. Word Division Manual
6. Hotel Red Book
7. Dictionary
8. Quotation Book
9. Guide to Periodical Literature
10. Secretarial Handbook
11. Zip Code Directory
12. Shipping and Postal Guide
13. Atlas
14. Yearbook
15. Job Description Manual

BOOK	RATIONALE
A.______________	______________________________
B.______________	______________________________
C.______________	______________________________

REFERENCE SOURCES - CRITERION-REFERENCED TESTS - LEVELS III, and IV - KEYS

CRITERION-REFERENCED TESTS III AND IV

LEVEL III

1. Answer: 2300 miles
   Source: Name of Atlas will vary
   Page: Will vary

2. Answer: Will vary
   Source: Business Periodicals Index or Reader's Guide to Periodical Literature
   Page: Will vary

3. Answer: Names will vary
   Source: The World Almanac and Book of Facts
   Page: Will vary

4. Answer: Harry Truman
   Source: Any biographical resource
   Page: Will vary

5. Answer: Will vary
   Source: Any Book of Quotations
   Page: Will vary

LEVEL IV

1. Dictionary - provides correct spelling, word division, syllabication, usage, and meaning.

2. Secretarial Handbook - provides grammar, style suggestions for typing, punctuation guides, suggested reference sources.

3. Answers will vary depending upon the type of business.

# COMPETENCY PROFILE
for
REFERENCE SOURCES

Student Name______________________________________

Start Date________________________

Completion Date_____________________

(date/initial)

	QUALIFIED	NOT QUALIFIED
RS-I-1 Introduction to Basic Reference Sources		
RS-II-1 Introduction to Library Sources		
RS-III-1 Location of Information in Various Reference Sources		
RS-IV-1 Selection of Office Reference Library		

CERTIFICATE OF COMPETENCY AWARDED____

Date Initials

CERTIFICATE OF COMPETENCY

this is to certify that

has demonstrated competence in the skills listed on the reverse side of this certificate in the area of

REFERENCE SOURCES

Completion date	School	Instructor

____ LEVEL I Introduction to Basic Sources

____ LEVEL II Introduction to Library Sources

____ LEVEL III Location of Information in Reference Sources

____ LEVEL IV Selection of Office Reference Library

REPROGRAPHICS/DUPLICATING

DESCRIPTION

Research has shown that the technology involved in reprographics/duplicating is rapidly changing the methods used. Few businesses use fluid and stencil processes. Copying technology is rapidly taking the place of offset and other traditional methods of duplicating. Copies can increase employee productivity and reduce costs. Students need to be aware of the existence of laser copiers, fiber optics, and satellite communiccations, and realize that these technologies will be outdated tomorrow. Learning the basics involved in master preparation and layout, neatness, accuracy, and basic machine operations and care can provide students with an appreciation for the importance of these factors even in the new technology.

This unit may be useful in preparing students for competing in FBLA/PBL, the Arizona State sanctioned co-curricular student organization. Competitive events: Office Procedures, Data Processing.

OVERVIEW OF LEVELS

LEVEL I	LEVEL II	LEVEL III	LEVEL IV
Fluid Duplication	Offset Plate Making	Evaluation of Reprographic Processes and Decision Making	
Stencil Duplication	Offset Multicolor Runs		
Offset Process	Layout of Brochures Program Covers Multipage programs		
Copying Process			
Collating			
Paper Cutters			

REPROGRAPHICS/DUPLICATING - LEVEL I

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
R/D-I-1	FLUID DUPLICATOR—Given one roughdraft copy containing typing, writing, drawing, and a self-evaluation form	the student will prepare a master and operate the fluid duplicator to produce the finished product	with items on the Production Methods Self-Evaluation Checksheet rated acceptable.
R/D-I-2	STENCIL DUPLICATOR--Given one roughdraft copy containing typing, writing, drawing, and a self-evaluation form	the student will prepare a stencil, and operate the stencil duplicator to produce the finished product	with items on the Production Methods Self-Evaluation Checksheet rated acceptable.
R/D-I-3	OFFSET PRINTER—Given one roughdraft copy containing typing, writing, drawing, and a self-evaluation form	the student will prepare a paper master and operate the offset printer to produce the finished product	with items on the Production Methods Self-Evaluation Checksheet rated acceptable.
R/D-I-4	COPYING MACHINE--Given one copy to be reproduced and a self-evaluation form	the student will operate the copy machine to produce the finished product	with items on the Production Methods Self-Evaluation Checksheet rated acceptable.
R/D-I-5	COLLATOR—Given a multipage test or program to collate and staple and a self-evaluation form	the student will correctly assemble and stample the product	with items on the Collating and Stapling Self-Evaluation Checksheet rated acceptable.
R/D-I-6	PAPER CUTTER—Given a stack of paper, instructions for size of finished product, and a self-evaluation form	the student will operate the paper cutter and produce paper cut to the proper size	with items on the Paper Cutter Self-Evaluation Checksheet rated acceptable.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
R/D-I-1	Fluid Duplication Introduction Advantages Disadvantages Master Sets Typing Writing and Drawing Correcting Errors Operation of machine Machine parts Initial priming Raising and lowering copy Positioning copy to the right and left Adding Fluid Pressure Control Cleanup Machine Surrounding area	R/D-I-1	Give an introduction to the spirit duplicator explaining its advantages and disadvantages. Inside each box of masters is an instruction sheet. After the students have read the instruction sheet, the instructor should demonstrate how a master is made, using all methods: typing, writing, and drawing. Following the demonstration the students should make a master using the same methods. Show samples of paper, explaining weight and finish, emphasizing the smoothness required for the fluid duplicator and the disadvantages of using a more porous finish. Students should read the instruction book that comes with each fluid duplicator. Instructor will then demonstrate the operation of the machine using the master that was made by the instructor in demonstrating how to make a master. Emphasize priming the wick at the beginning of the day, increasing and decreasing fluid, raising and lowering copy, moving the paper and the master to the left and to the right to position copy, raising the pressure lever as the number of copies increase to get copies of equal quality. Students should operate the fluid duplicator and run off five copies using the master that was made previously by the student. Evaluate the finished product with the Reprographics Self-Evaluation Checksheet. REFER TO: REPROGRAPHICS/DUPLICATING , page 10. Instructor should develop jobs as necessary to give competency on this machine. The work will be more meaningful if the duplicating jobs will be used rather than graded and discarded. REFER TO: GUIDE FOR INTEGRATING FLBA INTO THE CLASSROOM for examples of useful classroom projects.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
R/D-I-2	Stencil Duplication Introduction Advantages Disadvantages Cutting Stencils Typing Drawing and Writing Styli Letter Guides Shading and Texture Plates Cushion Sheets Scanner Operation of Machine Machine Parts Inking System Raising and Lowering Copy Moving Copy to Left and Right Counter Clean Up Machine Area	R/D-I-2	Explain the advantages and disadvantages of the stencil duplicator. After students have read the instruction sheet which is packaged with stencils, demonstrate how to make a stencil. Point out, when cutting the stencil, how pressure affects the clarity of the letter being typed and how the different cushion sheets make fine or broad letters. Use the mimeoscope and demonstrate how to letter using lettering guides, how to shade using shading and texture plates, and how different types of styli create different effects. Students should now be given a stencil and apply the methods demonstrated in making a stencil. Instructor may give them a specific copy to use to have them prepare an original copy. Show samples of paper emphasizing the finish that is needed for the stencil duplicator and the disadvantages of using a smooth finish as needed by the spirit duplicator. Instructor should then demonstrate the operation of the machine using the stencil that was made by the instructor earlier. Points to emphasize are adding ink, using ink control lever or dial, adjusting paper to the left or the right for horizontal centering, etc. Each student should now operate the stencil duplicator using the stencil that was cut earlier. Run five good copies and evaluate them by using the Reprographics Self-Evaluation Checksheet. REFER TO: REPROGRAPHICS/DUPLICATING, p. 10.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Stencil Duplication (Continued)		Instructor should develop jobs as necessary to allow students to gain competency on this machine. Jobs that are useful and needed by the instructor or others are the best as they are more meaningful to the operator--rather than busy work--and products are used rather than graded and discarded. NOTE: Refer to GUIDE FOR INTEGRATING FBLA INTO THE CLASSROOM for examples of useful classroom projects. Demonstrate the use of the scanner, if available, and have the students prepare a stencil using the scanner. Produce the necessary copies on the stencil duplicator. Evaluation will be done using the Reprographics Self-Evaluation Checksheet.

REPROGRAPHICS/DUPLICATING - LEVEL I

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
R/D-I-3	Offset Processes Introduction Advantage Disadvantage Masters Typing Writing and Drawing Ballpoint Pen Pencil Grease Pencil Ink Correcting Errors Operation of Machine Machine Parts Ink System Water System Feeding System Delivery System Impression System Clean Up Machine Area	R/D-I-3	Give an introduction to the offset printer explaining the advantages and disadvantages of the offset process. Inside the box of paper masters is an instruction sheet. After students have read the instruction sheet, the instructor should demonstrate how master is made, using all methods: typing, writing, and drawing. Following the demonstraton, the students should make a master using the same methods. Show samples of paper explaining weight and finish emphasizing the bond finish that gives the best impression. After students have read the instruction booklet that comes with the offset, the instructor will demonstrate the operation of the machine using the master that the instructor made earlier. Demonstration should start with the inking of the machine, adding fountain solution and all other adjustments needed for that brand offset. Students should operate the offset printer using the master made earlier. Run off five copies and evaluate the finished product with the Reprographic Self-Evaluation Checksheet. REFER TO: REPROGRAPHICS/DUPLICATING, page Weekly cleanup of the offset should be done by the instructor the first time; after that students should be able to clean the machine adequately. Instructor should develop jobs as necessary to give competency on this machine. Jobs that are useful and needed by the instructors or others are the best as they are more meaningful to the operator--rather than busy work--and the products are used rather than graded and discarded. NOTE: Refer to GUIDE FOR INTEGRATING FLBA INTO THE CLASSROOM for examples of useful classroom projects.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Copying Processes (Continued)		Discuss latest technology in copying process including: Microcomputers: peripheral device that can be used for output printing in place of or in addition to other printers. Information can be stored and edited, then printed. Facsimile: Transmittor of image for reproduction on hard copy. It electronically sends an original document from one location to a remote location. Laser: A beam of light that can carry millions of messages simultaneously. Satellite: a communication network that will allow users to send voice data, video or written information through the sky. Fast enough to send the book "War and Peace" every second. Ink Jet Spray Printers: Characters are sprayed on the page through an ink sprayer. Fiber Optics: Glass tubes as fine as thread which send light sources generated from electronic power. Discuss with students the rapidly changing technology. Have them bring newspaper and magazine advertisements on new copying equipment. Take a field trip to a large corporation such as IBM to see these new copiers in operation.

REPROGRAPHICS/DUPLICATING - LEVEL I

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
R/D-I-4	Copying Processes Inroduction Advantages Disadvantages Original Copy Operation of Machine Minor Repairs Masters Thermal Electrostatic Lasers Microcomputers Phototypesetting Process Punched Paper Tape Film Negative Computer Storage Facsimile Fiber Optics Ink Jet Printers Satellites	R/D-I-4	Explain the advantages and disadvantages of the copy machine. With a prepared copy, demonstrate the operation of the copy machine. Give the student several originals to be copied and have the student run off the required number of copies. Evaluate the finished product using the checksheet. Demonstrate how the paper is loaded into the copy machine. Save all jobs that are not needed immediately so that the students may run them while in class. Each copier has its own set of problems (Paper jamming, misfeeding, etc.). To keep the machine running, the operator should be taught to handle some of these problems. Explain and demonstrate how to correct these problems. Inform the student what is the limit that the operator can do before calling the company for service. Some copy machines will also make fluid duplicator masters and offset electrostatic masters. If the copy machine available is capable of doing this, demonstrate how it is done and how the duplicator or printer handles this type of master. Evaluate the finished product by using the Reprographics Self-Evaluation Checksheet. REFER TO: REPROGRAPHICS/DUPLICATING, p. 10. Take a field trip to a local print shop to observe latest technology in offset and phototypesetting processes.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
R/D-I-5	Collator Introduction Machine Operation On-Off Switch Activating Switch Feeder Arms Sequence of Papers Stapling Loading Stapler Long Arm Stapler Saddle Stapler	R/D-I-5	Explain what the collator is and demonstrate the operation of it. Provide a multipage job that needs to be collated and stapled so the student can apply the information gained in the previous demonstration. After the collating is done, the product must be stapled. Demonstrate where the staples should be placed; i.e., when stapling in the upper left hand corner, put the staple in at a 45 degree angle to the side and top (across the corner). When stapling on the left edge, the staples should be equal distance from the top and bottom, dividing the side into fourths with the middle staple missing. When stapling at the top it should divide the top into thirds. Evaluation will be through the Collating and Stapling Self-Evaluation sheet. REFER TO: REPROGRAPHICS/DUPLICATING, p. 11.
R/D-I-6	Paper Cutters Introduction Operation of Cutter Safety Features	R/D-I-6	Paper cutters vary from the 12" hand-operated model that will cut 1-15 sheets of paper to the power-operated model that will slice through 3 inches or 500 sheets of 20 lb. bond. Demonstrate how your model operates and the safey features that are built in to protect the operator from cutting off a finger. Make sure these safety features are used and not bypassed. All cutting jobs should be evaluated by using the Paper Cutter Checksheet. After demonstrating the proper methods to cut paper, have the student cut a ream of 8 1/2 x 11 paper into half sheets (5 1/2 x 8). Cut another ream of paper into envelope size sheets (4 1/4 x 9 1/2). Both sizes can be used in typing classes. Evaluate the cutting by using the Paper Cuter Checksheet. REFER TO: REPROGRAPHICS/DUPLICATING, p. 11.

REPROGRAPHICS SELF-EVALUATION CHECK SHEET

Production Methods of Printing and Finished Product

When the project is finished, check the items below to see if the finished product fulfills the instructions and meets business standards. If it does, check the acceptable column on the left--if not, check the deficiency on the right. After checking with the instructor, correct all deficiencies so that the product is acceptable.

Acceptable **Deficiency**

_____ 1. Master or stencil done correctly
Typing error _____
Placement error _____
Poor quality letters or drawings _____

_____ 2. Correct number of copies
Too few _____
Too many _____

_____ 3. Printing correctly placed
Too high _____
Too low _____
Too far right _____
Too far left _____

_____ 4. Clarity
Too light _____
Uneven _____
Blurred _____

_____ 5. Neatness
Smudges _____
Fingerprints _____
Backprinting _____
Shadowprinting _____
Corners bent _____
Paper Wrinkled _____

_____ 6. Correct paper
Wrong color _____
Wrong weight _____
Wrong finish _____

Acceptable **Deficiency**

_____ 7. Correct color(s) of ink or carbon
Wrong color _____

_____ 8. Working area is clean
Not clean _____

_____ 9. Machine is clean and ready for next project:

Fluid Duplicator

Master not removed _____
Excess paper not put away _____
Pressure regulator left on _____
Fluid left on _____
Motor left running _____

Offset Printer

Master not removed _____
Blanket not clean _____
Case not clean _____
Excess paper not put away _____
Levers not turned off (Neutral) _____

Stencil Duplicator

Stencil not removed _____
Rollers not cleaned _____
Cover not replaced _____
Case not wiped off _____

Copy Machine

Original not removed _____
Counter not returned to 1 _____
Machine problems not reported for repair _____

COLLATING AND STAPLING
SELF-EVALUATION
CHECK SHEET

When you have finished the project, check the items below to see if the project fulfills the instructions and meets business standards. If it does, check the acceptable column on the left--if not, correct the deficiencies.

All deficiencies should be corrected so that the project is acceptable.

Acceptable

______ 1. Pages are in the correct sequence with no repetitions or omissions.

______ 2. Corners and edges are even.

______ 3. Staples are properly placed.

______ 4. _____Number of copies collated.

PAPER CUTTER
SELF-EVALUATION
CHECK SHEET

When the project is finished, check the items below to see if the project fulfills the instructions and meets business standards. If it does, check the acceptable column on the left--if not, correct the deficiencies.

All deficiencies should be corrected so that the project is acceptable.

Acceptable

______ 1. Stock is cut to proper size.

______ 2. Stock was held sufficiently to keep it in place so all sheets are the same size.

______ 3. Edges are clean cut.

______ 4. Grain of stock is correct. (if applicable)

______ 5. Neatly stacked.

______ 6. When the stock has already been printed on, is the printing correctly placed after the stock is cut, i.e. tickets, business cards, etc.

COMPETENCY PROFILE

for

REPROGRAPHICS/DUPLICATING - LEVEL I

Student Name:______________________________ Start Date______________________

Completion Date______________________

(date/initial)

	QUALIFIED	SCORE	NOT QUALIFIED
R/D-I-1 Fluid Duplication			
R/D-I-2 Stencil Duplication			
R/D-I-3 Offset Process			
R/D-I-4 Copying Process			
R/D-I-5 Collator			
R/D-I-6 Paper Cutter			

CERTIFICATE OF COMPETENCY AWARDED____
Date Initials

REPROGRAPHICS/DUPLICATING - LEVEL II
COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
R/D-II-1	Given a copy, with negative if needed, and a Production Methods Self-Evaluation Checksheet	the student will burn an aluminum plate and duplicate five copies	with items on the Production Methods Self-Evaluation Checksheet rated acceptable.
R/D-II-2	Given a copy to be run in two colors and a Production Methods Self-Evaluation Checksheet	the student will make plates or masters and run off five copies	with items on the Production Methods Self-Evaluation Checksheet acceptable.
R/D-II-3	Given a program with instructions as to color of ink, color of paper, size of program, content and number of copies, and Production Methods, Collating, and Stapling, Paper Cutter, and Layout Self-Evaluation Checksheets	the student will be able to layout the entire program and reproduce it	with items on the Production Methods, Collating and Stapling, Paper Cutter, and Layout Self-Evaluation Checksheets rated acceptable.

REPROGRAPHICS/DUPLICATING - LEVEL II

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
R/D-II-1	Offset Plate Making	R/D/-II-1	After the students have read the directions included with each box of aluminum plates, the instructor should demonstrate the placing of the negatives on the mask, cutting the mask, opaquing the negatives, and the burning and developing of the plate. After the demonstration the students should do the same with another set. After drying, the plates should be run on the offset. The finished product is evaluated by using the Reprographics Self-Evaluation Checksheet. REFER TO: REPROGRAPHICS/DUPLICATING, page There are various types of platemakers on the market that produce an aluminum plate without the use of negatives. Give instructions and demonstrations that are necessary for the students to understand how that particular platemaker functions. Students should produce aluminum plates as that type of job becomes available.
R/D-II-2	Multicolor Runs (Offset)	R/D-II-2	Running a multicolor job requires one plate for each color. The object is to align the placement on the mask so that if stacked, each color would be in the space relative to the other colors. An excellent way to show this is with transparencies, each one representing a different color. When placed on top of each other the total picture develops. As no new operations on the offset are required, no demonstrations are needed. Running the same papers through, using a different plate and color of ink each time, and very careful alignment is all that is required. Plan one of your program covers or an invitation to be in more than one color. Evaluation will be done on the same basis using the Reprographics Self-Evaluation Checksheet. REFER TO: REPROGRAPHICS/DUPLICATING, page

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
R/D-II-3	Layout	R/D-II-3	Layout or copy preparation is the setup of a program, cover, or brochure so that it has eye appeal. Determining where the picture or character will go and what size the type should be and where it should be located is as important in reprographics as layout is in a great photograph or painting. Give the text, headlines, and one line drawing to the student to prepare a pasteup for a flyer. Evaluation to be done with the Layout Checksheet. Give the student the information for an FBLA banquet, set up each page of a four-page program. Determine what should be placed on each page and the proper order. Evaluation to be done with the Layout Checksheet. REFER TO: REPROGRAPHICS/DUPLICATING, p. 14. Assign students to prepare flyers advertising the different courses in the business department. Post them around school during pre-registration.

LAYOUT SELF-EVALUATION CHECKSHEET

When the layout is complete, check the items listed below. All items that apply must be checked in the acceptable column. If you cannot check the acceptable column, redo the pasteup so it is acceptable. Those items that do not apply to this particular job should be marked N/A.

ACCEPTABLE

__________1. Pasteup is prepared on proper size needed for finished job.

__________2. All parts of the pasteup are properly aligned.

__________3. A nonreproducing pencil was used for all marks not meant to be printed.

__________4. Pasteup is free of smudges and unwanted marks.

__________5. Line drawings are sharp and clear

__________6. Pasteup free of errors in spelling.

__________7. Headings are in larger type than text to attract attention.

__________8. Artwork is placed for good eye appeal.

__________9. Borders and margins are uniform—unless otherwise done for effect.

__________10. Photographs have good contrast. (Black and white preferred)

__________11. Pages appear in proper sequence in a folded program.

COMPETENCY PROFILE

for

REPROGRAPHICS/DUPLICATING LEVEL II

Student Name: ______________________________

Start Date ______________________

Completion Date ______________________

(date/initial)

	QUALIFIED	SCORE	NOT QUALIFIED
R/D-II-1 Offset Plate Making			
R/D-II-2 Offset Multicolor Runs			
R/D-II-3 Layout			

CERTIFICATE OF COMPETENCY AWARDED ______________________________

Date   Initials

REPROGRAPHICS/DUPLICATING - LEVEL III

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
R/D-III-1	Given five job descriptions, with the price list from the school reprographics department	the student will be able to figure the cost of the jobs	with 100 percent accuracy on all five jobs.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
R/D-III-1	Evaluation of Reprographic Processes and Decision Making Estimating Cost of Duplicating Jobs Maintaining Work Log Maintaining Inventory Control Ordering Supplies	R/D-III-1	Have the students make a list of expendable materials that are used in a reprographics department and secure a price from a catalog for each item. Give the students a price list of materials used in the reprographic department of the school and have the students figure the cost of jobs being produced. Have the students prepare an inventory of supplies in the reprographics department. As supplies get low, have the students make a requisition to reorder the supplies. Have the students keep a work log of all jobs showing when they come in and when they are finished and delivered.
	Decision Making Copy Appearance Length of Run Paper Size Range Speed Cost Range		Assign students to investigate the school office. Determine whether the most cost effective method of producing copies is being used to produce such documents as letters, reports, memorandums, and form letters. Have student's list recommendations for improving cost effectiveness.

COMPETENCY PROFILE

for

REPROGRAPHICS/DUPLICATING - LEVEL III

Student Name:____

Start Date__________________________

Completion Date______________________

(date/initial)

QUALIFIED	SCORE	NOT QUALIFIED

R/D-III-1 Evaluation of Reprographic Processes and Decision Making

CERTIFICATE OF COMPETENCY AWARDED____

Date Initials

CERTIFICATE OF COMPETENCY

this is to certify that

____

has demonstrated competence in the skills listed on the reverse side of this certificate in the area of

REPROGRAPHICS/DUPLICATION

____________________ Completion date

____________________ School

____________________ Instructor

LEVEL I

_____ Fluid Duplication

_____ Stencil Duplication

_____ Offset Process

_____ Copying Processes

_____ Collator

_____ Paper Cutters

LEVEL II

_____ Offset Plate Making

_____ Offset Multicolor Runs

_____ Layout

LEVEL III

_____ Evaluation of Reprographic Processes and Decision Making

TELEPHONE TECHNIQUES

DESCRIPTION

Today, business relies on communications for its existence. Because telephone communication constitutes as much as 90 percent of the business transactions in many offices, it is fundamental that all prospective employees utilize good telephone techniques. Further utilization of electronic communication equipment is also necessary for increased efficiency in business operation.

This unit may be useful in preparing students for competing in FBLA/PBL, the Arizona State sanctioned co-curricular student organization. Competitive event: Office Procedures

OVERVIEW OF LEVELS

LEVEL I	LEVEL II	LEVEL III	LEVEL IV
Importance of the Telephone Telephone Manner Telephone Courtesy Telephone Directory Placing Calls Receiving Calls Special Telephone Equipment and Services			

TELEPHONE TECHNIQUES - LEVEL I

COMPETENCY GOALS

At the conclusion of study for this level, the student, when given the task, will demonstrate minimum job competencies according to the specified standard.

CODE	TASK	PERFORMANCE	COMPETENCY STANDARD
TT-I-1	Given a true-false test on the importance of the telephone	the student will complete the test	with 80 percent accuracy.
TT-I-2	Given a paragraph	the student will read the paragraph aloud using voice and speech patterns	with acceptable rating on all items of a Telephone Manner and Habits Checklist.
TT-I-3	Given a script and an evaluation form	the student will evaluate the script	with 80 percent accuracy.
TT-I-4	Given a telephone directory and a list of questions	the student will find the answers in the telephone directory	with 100 percent accuracy.
TT-I-5	Given a situation requiring the placing of a local call	the student will look up the telephone number in the telephone directory and place the telephone call	with acceptable ratings on all items on the Telephone Manner and Habits Checklist.
TT-I-6	Given a role playing situation in which the teacher places a call	the student will answer the call and record the necessary message	with acceptable ratings on all items of the Telephone Manner and Habits Checklist.
TT-I-7	Given an objective test on special telephone services and equipment	the student will complete the test	with 80 percent accuracy.

TELEPHONE TECHNIQUES - LEVEL I

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
TT-I-1	Importance of the Telephone Direct and Immediate Human Touch Use with Computers Most Used Form with Public Portrays Company Image Basic Purposes Give Information Obtain Information	TT-I-1	Give student an overview of the role of the telephone in today's business world. Contact the local office of Mountain Bell Telephone Company for free films on telephone techniques, teletrainer, telephone simulators. Plan a field trip to the local telephone company (or large company) so students may see the functioning of the telephone in the various business departments. If video tape equipment is available, this could be taped for the class to see. Invite a speaker from the telephone company. This speaker should be contacted several months ahead. Invite a local businessperson to speak on the importance of the telephone in the business world. Invite a person knowledgeable about telecommunications to speak to the class. Students should have knowledge of the existence of new technology.
TT-I-2	Telephone Manner Voice Speak Clearly Low-pitched Volume Voice Inflection Speech Enunciations Moderate Rate Emphasis with Words Spell Hard-to-Understand Words and Numbers Pronunciation	TT-I-2	Since it is the voice that conveys an impression of the student, it is important that the student practice clearly speaking with a low-pitched voice with inflections. The sound of the voice should convey a friendly, pleasant, and interested manner. One suggested way to evaluate the voice of each student is: Day 1: Provide the students with a card on which they will find the following questions to be answered: 1. What is your name? 2. Where do you live? 3. What is your favorite sport? 4. What do you plan to do when you graduate? Record each student's voice as the student answers the questions.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS

Telephone Manner (continued)
- Vocabulary
  - Avoid Trite Words
  - Avoid Slang
  - Use Descriptive Words
  - State Ideas Simply and Logically

Day 2: Distribute a checklist of the "Elements of a Good Telephone Manner" to each student in the class. REFER TO: TELEPHONE TECHNIQUES page 21 for evaluation form.

Explain what is meant by each of the elements.

Inflection--Changes in pitch or volume during course of speaking
Speed--Number of words per minute
Pitch--Highness or lowness
Volume--Degree of loudness

As you play the recording of the first student's voice, have each student in class evaluate the voice using the checklist. Place the name of the "voice" at the top of the checklist.

Distribute another evaluation form to each student. Play the second recording and have the students evaluate the second recording as they did the first one.

After the recordings have been evaluated, have the students place two stars on the evaluation form of the "voice" they considered the best and one star for the next best. Return all evaluation forms to the "voice." Make some recognition of the winner (the one with the most stars).

Give the student paragraphs to be practiced until they can be read in one minute.
REFER TO: TELEPHONE TECHNIQUES , page 12.

Develop a critique form to be used to evaluate the students' phone use as follows:

Volume	Loud	Soft	OK
Speed	Fast	Slow	OK
Tone	Cold	Harsh	OK

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Telephone Manner (Contnued)		Duplicate enough copies so that each student can distribute six copies to different people with whom they have recently spoken on the telephone. The six people are to judge the students on the critique form. When the students get the copies back, they are to fasten them to a sheet on which they will make specific suggestions on ways to raise their low ratings.
TT-I-3	Telephone Habits and Courtesy Receiving Calls Phone Covered During Absence Identify Yourself Return all Calls Promptly Speak Distinctly Be Friendly Let the Caller Hang up First	TT-I-3	Supply each student with a copy of the "Telephone Manner and Habits Checklist". Tell students that their own calls will be evaluated by this checklist. Provide examples of written narratives of secretaries placing calls, receiving calls and answering the calls for others. The students should analyze the narratives by using the checklist.
	Placing Calls Place Own calls; stay on Line Call at Convenient Times End the Conversation in Business-Like Manner Be Sure of Number Message Taking Treat Every Message As Important Screen Calls Take Messages Accurately Give Information Transfer Calls Be Tactful Get Information		Divide the class into teams. Give each student a piece of paper with a word such as: Angry, Tired, Friendly, Problem, Emergency. One student will act as a caller and will select another student as responder. Others in the group will evaluate the responses. Their group should determine if the responder was: Attentive, Sympathetic, Concerned, Cheerful, or Urgent. Discussion should follow to determine if the reponses fit the situation. Continue until each student has had an opportunity to be the caller and responder.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
TT-I-4	Telephone Directory Alphabetic Section Name, Address, Telephone Number of Subscriber Emergency Numbers Instructions for local calls long distance calls service calls special calls Areas codes and Time zones for US and Canada Sample rates Telephone Company Business and Office Numbers Consumer Information	TT-I-4	Provide each student with a telephone directory. These can be collected by having the students bring in their old telephone directories. Explain the importance of knowing alphabetic rules when using a directory. REFER TO: FILING/RECORDS MANAGEMENT p. F/RM-3. Call out names, products, or services to be looked up in the directory. Give a point to the first student to find the telephone number. Keep track of points obtained by each student. Have a "Telephone King or Queen" for the day. HINT: If you live in a small community, try to obtain telephone directories from one of the larger cities. It is essential that students learn about larger city directories because of the mobility of the population. Have students name the various items which can be found in the telephone directory. List the items on the board for class discussion.
	Classified System Goods and Services Postal Zip Codes Street Maps Personal Directory		Duplicate a yellow page and a white page with several names or groups out of order. Have students identify the item incorrectly listed and indicate where these items should be listed. Explain the necessity of keeping a personal telephone directory of most-used numbers in an office. Have each student prepare a personal directory. The Telephone Company provides books for personal directories. Prepare a bulletin board displaying pictures of the various kinds of files used to store frequently needed numbers and include samples of the yellow and alphabetic pages.

TELEPHONE TECHNIQUES - LEVEL I

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
TT-I-5	Placing Calls Planning the Call Write down the information Purpose or Reason Name of Person Points to Cover Questions Gather Necessary Material Note Pad and Pencil Calendar Appointment Schedule Notes Determining the Best Time Business Hours Time Zones Determining Long-Distance Service Station-to-Station Person-to-Person Direct Distance Dialing	TT-I-5	Start your first calls by using prepared scripts. The Telephone Company has these prepared or many office practice texts will have suggestions. Role play with the teacher and student making a telephone call. Play tape recordings of telephone calls and identify and discuss the good and bad features of each call. Give students a map of time zones and have them discuss what time it would be in different parts of the country and how this affects long-distance calling Stress the difference in cost for calling station-to-station compared to person-to-person. Emphasize that Direct Distance Dialing (DDD) is a method of placing all station-to-station calls and some person-to-person calls. Consult the telephone directory for rate charts and directions. Students may use the area code map on the back of the telephone directory to determine area codes. Role play on all calls. Students should place both local and long-distance calls. All calls should be evaluated and recorded. Distribute the information sheet, Modern Office Products. In order to have realistic telephone calls, students should assume they are working for Modern Office Products throughout this unit. The teacher should compose simulated telephone calls. Include incoming calls requiring students to: determine who is calling. to withhold information request due to company policies. to refer the caller to another department within the business. place the caller on hold while obtaining requested information. handle a complaint.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
TT-I-6	Receiving Calls Taking Messages	TT-I-6	Students could select any of the following situations to role play on the teletrainer or other telephone equipment. Supervisor is talking on another phone; take necessary action. Supervisor is out of town; take necessary action. Supervisor is out of office for the day; take a message. Necessary information is on file; take appropriate action. Caller has reached the wrong department, transfer the call. Supervisor needs plane reservations for a conference in New York on Thursday; plan and place the call. REFER TO: TELEPHONE TECHNIQUES p. TT-19 for message form.
TT-I-7	Special Telephone Equipment and Services Equipment PBX console Call Director DATA PHONE service Speakerphone Picturephone Bellboy Service Card Dialer	TT-I-7	Prepare bulletin board displays of special equipment. Number actual pictures, slides, or overhead transparencies of special kinds of telephone equipment and have students identify each piece of equipment. Obtain brochures from manufacturers and the telephone company. Have students define the terms listed in the outline of this section.

CODE	OUTLINE	CODE	LEARNING ACTIVITIES AND TEACHING SUGGESTIONS
	Services (continued) Telephone Answering Service Reverse Charge Toll Service Station-to-Station Call Person-to-Person Call Direct Distance Dialing (DDD) Collect Calls Telephone Credit Cards Wide Area Telephone Service (WATS) Extended Area Service (EAS) Leased Lines Tie-Line Service Foreign Exchange Service Mobile Service Third Number Billing Conference Calls Sequence Calls		Have the students who are employed in offices describe the telephone equipment used in their offices. HINT: Telephone Pioneers of America, 195 Broadway, New York, New York 10007 is composed of telephone employees who contribute their own time to repair old equipment that can be used by non-profit organizations. Through their services schools may receive PBX for classroom use.

TELEPHONE TECHNIQUES - CRITERION-REFERENCED TEST - LEVEL I

TT-I-1 - IMPORTANCE OF THE TELEPHONE

Determine whether each of the statements below is true or false. Write a "T" for true, or an "F" for false, in front of each statement.

___1. Phone calls play a major role in most business transactions.

___2. Most firms do more business by phone than by any other single medium in actual number of contacts.

___3. When you use the telephone you are using only your voice and words to communicate.

___4. Visual and physical pathways of communication contribute as much as 70 percent to understanding.

___5. Telephone communication occurs when the information in one person's mind is reproduced in another person's mind

___6. The telephone transmits voice as electrical impulses.

___7. The five steps of message transmittal and reception are: communication of idea as words, transmitter, telephone lines receiver, reception of idea as words.

___8. The proper communication of an idea is dependent upon your selection of appropriate words.

KEY: all are true.

TELEPHONE DYNAMICS, Universal Training Systems Co. 3201 Old Glenview Road, Wilmette, Illinois.

Reading paragraph

The following paragraphs should be read in one minute. READ THE PARAGRAPHS ALOUD AS IF YOU WERE ON THE TELEPHONE. Instead of the phone, record your voice on a cassette. Listen to your recording for qualities that need improvement. Time yourself until you can read the paragraphs in one minute.

> As a representative of your company, it is important that you speak clearly on the telephone. That means that you must be understood. Although there is no set rate of speech, most expert speakers talk at between one hundred forty and one hundred sixty words per minute. That is a good speed for telephone communication. It is not too fast to be understood, and it does not give the listener the impression that you are under pressure. Nor is it too slow.
>
> The one hundred sixty word rate adds an element of dignity to your voice. The one hundred sixty word rate also gives a sound image to the caller that establishes both you and your company as efficient and well organized. To give the caller the kind of impression that you wish of yourself and of your company, speak at one hundred and sixty—that's one hundred and sixty words per minute.

TELEPHONE TECHNIQUES - CRITERION-REFERENCED MEASUREMENT - LEVEL I

TT-I-2 - TELEPHONE MANNER

Competency: REFER TO: TELEPHONE TECHNIQUES page TT-12. The student will read the paragraphs in one minute which indicates the proper rate of speech. Use the following checklist to evaluate Telephone Manner of Voice and Speech.

VOICE	Acceptable	Not Acceptable
Spoke Clearly		
Volume		
Low-pitched		
Voice Inflection		

SPEECH		
Enunciation		
Moderate Rate (1 minute time)		
Emphasis with words		
Pronunciation		

All items will be evaluated by the teacher, and the student must receive all acceptable ratings.

TELEPHONE TECHNIQUES - CRITERION-REFERENCED TEST - LEVEL I

TT-I-3 - TELEPHONE HABITS AND COURTESY

Directions: Read the situation below. After reading the narrative, answer the questions below the narrative with "Yes" if the item was done. Answer "No" if the item was not done.

Mr. Jones told his secretary Ms. Smith, that he was leaving the office to go to the Empire Company and would be back at 10 a.m. The phone rang. Ms. Smith was talking to one of the sales persons but excused herself and answered the telephone on the sixth ring.

> Ms. Smith, "Mr. Jones Office, Ms. Smith speaking."

She took care to speak directly into the telephone. Her voice was clear, natural, and pleasant. The caller was Mr. George Perkins.

> Ms. Smith, "What can I do for you?"
> Mr. Perkins, "I need the figures on the Smith Sidewalk bid."
> Ms. Smith, "One moment, please."

After a period of five minutes Ms. Smith returned to the phone.

> Ms. Smith, "I can't seem to find those figures. I will have to have Mr. Jones return your call. Thank you for calling."
> Mr. Perkins, "Thank You."

Mr. Jones enters the office.

> Ms. Smith, "A man wants you to call him back. I have his name somewhere on my desk, but I don't think it was too important."

Ms. Smith hands Mr. Jones a scrap of paper with "Mr. Perkins" written on it.

> Mr. Jones, "I will call him right back. Will you get Mr. Perkins on the phone. Since it is a long-distance call and I don't have the number, just call the operator."

EVALUATION FORM

_____1. Before leaving the phone, the employer left word about destination and returning time?

_____2. The phone was answered promptly before the second ring?

_____3. The secretary identified herself at the beginning of the conversation?

TELEPHONE TECHNIQUES - CRITERION-REFERENCED TEST (continued)

TT-I-3 - TELEPHONE MANNER AND HABITS

_____4. Care was taken to speak directly into the telephone--clearly, naturally, and pleasantly?

_____5. The conversation was personalized by using the caller's name at every opportunity?

_____6. The secretary was informative when taking calls for another?

_____7. The secretary offered help and assistance to the caller?

_____8. Messages were recorded and information checked?

_____9. If it was necessary for the caller to wait longer than a minute, the secretary offered to return the call?

_____10. The secretary thanked the party for calling?

_____11. All calls were returned promptly?

_____12. All messages were treated as important calls?

_____13. The employer placed all local and long-distance calls?

_____14. All long-distance calls were dialed direct?

_____15. Was the number given when the call was placed through the operator?

KEY

1. YES
2. NO
3. YES
4. YES
5. NO
6. YES
7. YES
8. NO
9. NO
10. YES
11. YES
12. NO
13. NO
14. NO
15. NO

TELEPHONE TECHNIQUES - CRITERION-REFERENCED TEST - LEVEL I

TT-I-4 - TELEPHONE DIRECTORY

Fill in the blanks with answers obtained from the telephone directory.

1. If you wanted the Police, what number would you call?____________________
2. The telephone business office is open from ___________ to _____________.
3. Give the name and number of a printing company._______________________
4. If it is 5 p.m. here, what time is it in South Dakota?___________________
5. What is the area code for Montreal, Canada?__________________________
6. To call the Criminal Investigation Division of the Arizona State Government, what number would you call?____________________
7. What is the number of Western Airlines for ticket information?______________
8. What is the number and name of a dermatologist?_______________________
9. What is the number of the local post office?_________________________
10. What is the number of the Internal Revenue Service?_____________________
11. What number would you call to report a fire?_________________________
12. Give the name and number of an automotive repair service?_________________
13. Under what heading are Lawyers listed?_____________________________
14. Under what heading are Doctors listed?_____________________________
15. Give the name and number of a place that you would call to hold and serve a local FBLA/PBL Banquet._______________________

HINT: The teacher must take the questions listed above and look up the answer in the local telephone directory. In some cases, the student's answer must be verified with the local telephone directory.

TELEPHONE TECHNIQUES - CRITERION-REFERENCED MEASUREMENT - LEVEL I

TT-I-5 - PLACING CALLS

STUDENT DIRECTIONS: Using the following information, place a telephone call to a local candy supplier.

1. You are the secretary of your local FBLA/PBL chapter.
2. The chapter wishes to sell six cases of milk chocolate bars (plain) and six cases of chocolate bars (nut). You need to ask the price.
3. The sale will be held on next Friday (current date).
4. Ask if they can deliver the candy.
5. Explain that the payment for the last candy was delayed. The school sent the check yesterday.
6. The company will need to bill your school. The Purchase Order number is DO5678.

You will be evaluated by the Telephone Manner and Habits Checklist.

TEACHER DIRECTIONS:

1. You will answer the phone by assuming the role of the order sales clerk of the candy company. (The student must look up the number in the telephone directory.)
2. The price of the candy is $21.60 for plain chocolate and $28.80 for chocolate bars with nuts.
3. Yes, you company will deliver the candy on Thursday at 2:00 p.m. Will someone be there to receive it?

   If answer is No, make arrangements for another time.
4. Thank the student for the payment and you will be watching for it.
5. When student gives you Purchase Order number, repeat DO5678.
6. Use the Telephone Manner and Habit checklist to evaluate the student. You will not use the section on answering calls for others or Receiving a call. Students must receive acceptable ratings on all items.

TELEPHONE TECHNIQUES - CRITERION-REFERENCED MEASUREMENT - LEVEL I

TT-I-5, 6 - TELEPHONE TECHNIQUES

TELEPHONE MANNER AND HABITS CHECKLIST

Directions: Check all items that are acceptable. Those items not checked will indicate a need for improvement.

Telephone Manner

Voice

___ Tone
___ Pitch
___ Volume
___ Inflection

Speech

___ Enunciation
___ Moderate Rate
___ Emphasis with words
___ Spell Hard-to Understand Words and Numbers
___ Pronunciation

Vocabulary

___ Avoid Trite Words
___ Avoid Slang
___ Use Descriptive Words
___ State Ideas Simply and Logically

Telephone Habits

Courtesy

___ Personalize the Conversation
___ Apologize for Errors and Delays
___ Say Thank You and You're Welcome
___ Greet the Caller Pleasantly
___ Try to Visualize the Person
___ Be Attentive
___ Try to be Helpful

Receiving a Call

___ Phone Attended During Absence
___ Identify Yourself
___ Return All Calls Promptly
___ Answer Promptly
___ Speak Distinctly
___ Be Friendly
___ Let the Caller Hang Up First

Answering Calls for Others

___ Treat Every Message As Important
___ Screen Calls
___ Take Messages Accurately
___ Give Information
___ Get Information
___ Transfer Calls
___ Be Tactful and Helpful

Placing Calls

___ Place Own Calls, Stay on Line
___ Call at Covenient Times
___ End the Conversation in a Businesslike Manner
___ Be Sure of Number
___ Allow Time to Answer
___ Know Number When Calling Long Distance

TELEPHONE TECHNIQUES - CRITERION-REFERENCED MEASUREMENT - LEVEL I

TT-I-6 - RECEIVING CALLS

TEACHER DIRECTIONS

The teacher should:

1. Follow the script very closely, varying only to make the conversation more natural.

2. Be led away from the script only by the student's out-of-the-ordinary responses. A careful note of any variation should be made at this time. This record is necessary to take into account differences in the phone memo messages.

3. Use the Telephone Manner and Habits Checklist, checking only those items that apply to the test call.

4. Review the points you want to cover:
   A. You are a positive caller
   B. You do not offer information without student request.
   C. Follow the script closely.

5. * is symbol for teacher instruction.

6. Student directions are on TELEPHONE TECHNIQUES p. 22.

TEACHER SCRIPT

When student answers (correctly of course):

*Introduce yourself and ask for your principal by name, __________ (Insert name).

"Good Morning/Afternoon. I am Ann Dove, the Chairperson of this year's March of Dimes campaign. May I speak to (Insert Principal's name).

*Student should say no. If student doesn't offer to be of help ask:

"Can you help me?"

*If student does offer to help say:

"Yes! Thank you. I would like to talk to (principal's name) about this year's March of Dimes campaign. I would like to meet with him for lunch tomorrow.

*Don't say where unless asked.

*Student shouldn't make a definite appointment. If done accept as a firm commitment.

"Good, I'll see _______________(Principal's name) then."

*Again, don't say where unless asked.

*As a final request:
"Would you please have _______________ call me before 3p.m. today? My number is 626-1528.

*Check for repeat on number, correct if needed.

*Verify correct information if message is read back.
*Close.

"Thank you. Goodbye."

TELEPHONE TECHNIQUES - CRITERION REFERENCE MEASUREMENT - LEVEL I

TT-I-6 - RECEIVING CALLS

STUDENT DIRECTIONS:

You will receive a phone call. Be sure you are familiar with the following information:

You are the secretary for your High School Principal, ____.
Your employer is in with a parent when your call comes. The meeting will probably last another 20-25 minutes.

Your principal is very interested in good relations with the community and enjoys visiting with members of the community who are interested in your school, too. But you are never sure of the appointment schedule.

You are in the middle of six things when the phone rings.

Take the call, use your best telephone techniques, and prepare the following form if necessary:

MEMO OF CALL

To ____________________________________

From __________________________________

AREA CODE	TEL. NO.	EXT.

☐ Telephoned	☐ Will call you later
☐ Please call	☐ Called to see you
☐ In response to your call	☐ Wishes to see you

Message __________________________________

Received by ____________ Date ______ Time ______

TELEPHONE TECHNIQUES - CRITERION-REFERENCED TEST - LEVEL I

TT-I-7 - SPECIAL TELEPHONE EQUIPMENT AND SERVICES

Directions: In the Answers column write the letter from Column 1 that represents the word or phrase that best matches each item in Column 2.

Column 1

(A) Answering Service
(B) Area Code
(C) Automatic Answering
(D) Bellboy Service
(E) Call Director
(F) Card Dialer
(G) Collect Calls
(H) Conference Calls
(I) Credit Card
(J) Data Phone Service
(K) DDD
(L) Directory Assistance
(M) Emergency
(N) Leased Lines
(O) Mobile Services
(P) PBX Console
(Q) Person-to-Person
(R) Speakerphone
(S) Station-to-Station
(T) WATS

Column 2

____1. The person calling a number charges the call to the person he is calling.
____2. A long-distance call made to one particular person.
____3. Service in which an unlimited number of long-distance calls can be made for a fixed monthly rate.
____4. A long-distance call dialed by the caller.
____5. A service to be used by a caller who cannot locate a number in the local telephone directory.
____6. A call made to the police, ambulance, or fire department.
____7. A long-distance call in which the caller is willing to speak to anyone who answers the phone.
____8. A service that allows one to bill calls made from any telephone.
____9. The telephone number prefix that is different in each part of the country.
____10. A call made to two or more people in different parts of the country at the same time.
____11. Small plastic cards for numbers you call frequently.
____12. Personal signalling service to alert carrier to call in for a message.
____13. Equipment allowing one or more operators to receive calls from outside, place all outgoing calls, and handle all calls within the offices of the company.
____14. Means for computers to talk to computers.
____15. Teletypewriter private line service.
____16. Calls may be made to automobiles, aircraft, etc.
____17. Small desk switchboard which permits you to answer many lines from one location.
____18. Message received through loudspeaker so that it is not necessary to pick up the phone
____19. Operator will answer your calls when you are out of the office.
____20. Answering and recording set which answers the telephone and records a message.

KEY

1. G
2. Q
3. T
4. K
5. L
6. M
7. S
8. I
9. B
10. H
11. F
12. D
13. P
14. J
15. N
16. O
17. E
18. R
19. A
20. C

ELEMENTS OF A GOOD TELEPHONE MANNER

	Rating	
	Acceptable	Unacceptable
I. VOICE		
Spoke Clearly		
Low pitched		
Correct Volume		
Voice Inflection		
II. SPEECH		
Enunciation		
Moderate Rate		
Emphasis with Words		
Pronunciation		
III. VOCABULARY		
Avoid Slang		
Use Descriptive Words		
Avoid Trite Words		
State Ideas Simply and Logically		

MODERN OFFICE PRODUCTS

Modern Office Products is the name of the company for which you work. It sells all office products to both retailers and wholesalers, but it specializes in stationery and envelopes. The company president in Mr. John H. Will. His secretaries are John Smith and Mary Jones. Their extension is 100 (the secretaries answer all phone calls for the president). The office is divided into three departments: catalog sales, advertising, and office services.

You are employed in the catalog sales department, which is responsible for quoting prices for all catalog items. Your department manager is Jane Ann Wilson. Her secretary is Lois Smith. Their extension is 200. Your co-worker and immediate supervisor is Sandra Moore. She is responsible for keeping all catalog prices current and being sure that all orders are processed promptly. Her duties include telephoning customers to explain any price changes and/or delays in delivering an order. Five regional salespeople are employed in this department: James George, Northwestern Division, extension 201; Bobbie Liebow, Southwestern Division, extension 202; Eugene Tanner, Central Division, extension 203; Carl Myers, Northeastern Division, extension 204; and Joyce Hoffman, Southeastern Division, extension 205.

NOTE: Throughout the telephone unit, students should use the above information for all calls received or placed. Students can make telephone lists of frequently used numbers and/or prepare a card file of frequently used numbers. The teacher can compose a variety of situations for the students to provide scripts demonstrating proper telephone techniques. Calls can include employees calling in sick, salespeople requesting current information, customers requesting information about products available and prices, persons requesting information about company employees, customer requests requiring the catalog sales department office personnel to contact the salespeople, requests for current information about products and prices from suppliers, delays in processing orders necessitating a call to the customer explaining the problem, etc.

COMPETENCY PROFILE

for

TELEPHONE TECHNIQUES - LEVEL I

Student Name ______________________________

Start Date ______________________

Completion Date ______________________

(date/initial)

	QUALIFIED	SCORE	NOT QUALIFIED
TT-I-1 Importance of the Telephone			
TT-I-2 Telephone Manner			
Voice Speech			
Vocabulary			
TT-I-3 Telephone Habits and Courtesy			
TT-I-4 Telephone Directory			
TT-I-5 Placing Calls			
TT-I-6 Receiving Calls			
TT-I-7 Special Telephone Equipment and Services			

CERTIFICATE OF COMPETENCY AWARDED ______________________________________

Date Initials

CERTIFICATE OF COMPETENCY

this is to certify that

____

has demonstrated competence in the skills
listed on the reverse side of this certificate
in the area of

TELEPHONE TECHNIQUES

Completion date	School	Instructor

LEVEL I

__________ Importance of the Telephone
__________ Telephone Manner
__________ Telephone Habits and Courtesy
__________ Telephone Directory
__________ Placing Calls
__________ Receiving Calls
__________ Special Telephone Equipment and Services